

THE EFFECTIVE USE  
AND PROPER CARE OF  
**THE MICROSCOPE**

*by*

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**American Optical Company**



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## Basic Summary of Use

### I. Microscope *without* substage condenser.

- A. Place specimen on stage over the center of the opening in the stage. Sliding the preparation under the stage clips will hold it in place.
- B. Place lowest power objective (one with shortest mount) a short distance above the specimen.
- C. Turn concave side of mirror toward light and move until field of view is as uniformly lighted as possible.
- D. Raise body tube by turning coarse adjustment knob until the specimen is seen clearly. Readjust mirror, if necessary, to obtain best illumination.
- E. For greater magnification turn the nosepiece to bring the higher power objective over the specimen and refocus slightly as needed.

### II. Microscope *with* substage condenser.

- A. Using an illuminated surface type lamp *which has no lenses to concentrate its light*.
  1. Put specimen on stage and objective in place as in A and B above.
  2. Use *plane* (flat) surface of mirror to light field of view. Raise body tube to focus specimen.
  3. Remove eyepiece and open iris diaphragm of substage condenser so that the back lens of the objective is nearly filled with light ( $\frac{3}{4}$ ths to  $\frac{7}{8}$ ths). Focus condenser up and down until the objective is as uniformly filled with light as possible.
  4. Replace eyepiece. If field is not fully lighted, moving the lamp nearer to or farther from the mirror may help.

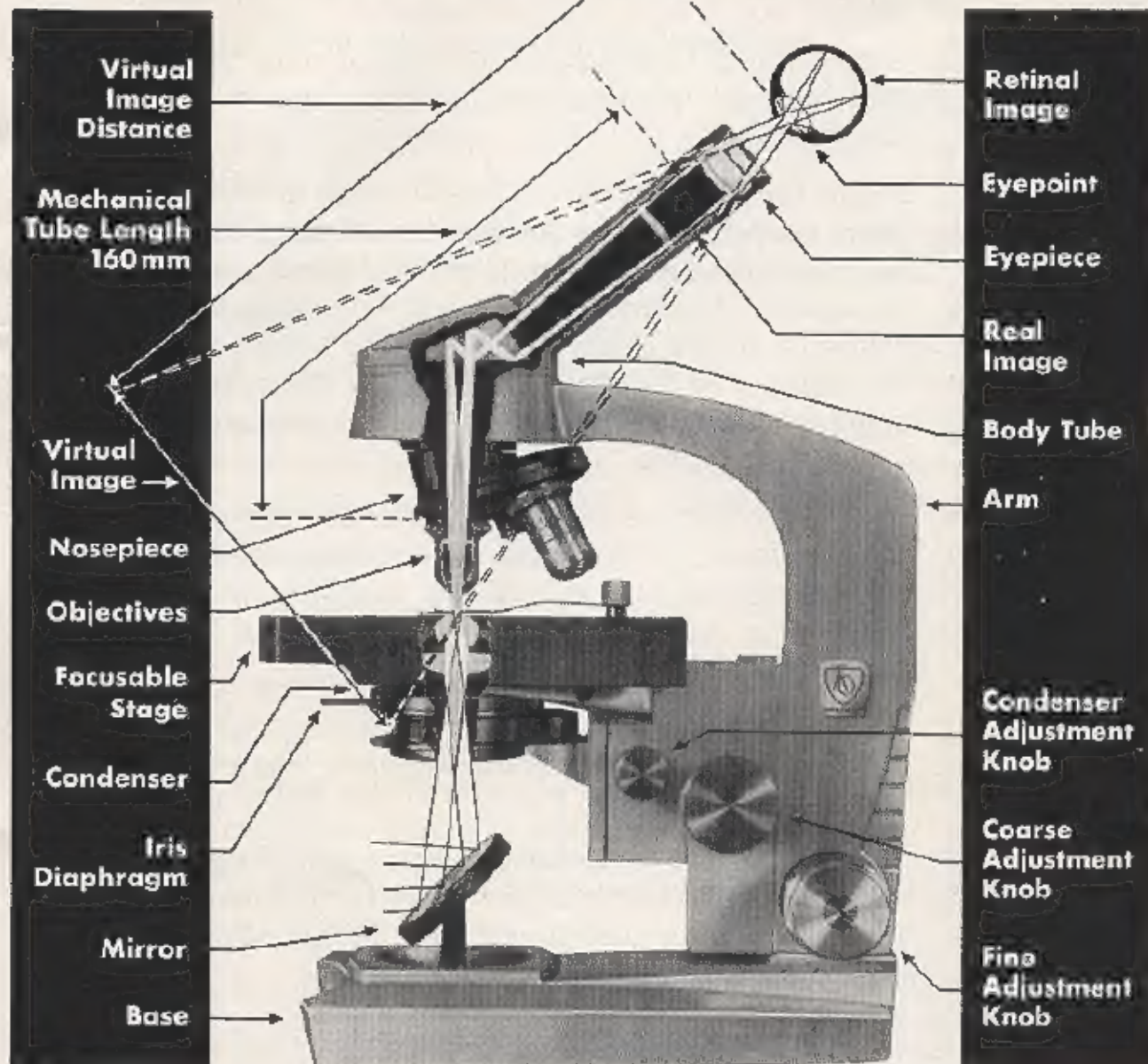


B. Using lamp *with condensing lenses and iris diaphragm.*

1. Place lamp 8 to 10 inches in front of microscope, and turn so that the light falls on the center of the mirror.
2. Focus the illuminator by moving lamp bulb, or lamp condensing lens so that the filament image is focused on the iris diaphragm of the microscope condenser. Closing the lamp iris will increase the visibility of the filament image. The lamp should be adjusted so that the filaments and the reflected images of the filaments are intermeshed or between each other.
3. Place specimen on stage and focus microscope on the specimen. Close lamp iris and raise or lower microscope condenser until the lamp iris is seen sharply in focus with the specimen. Open lamp iris until field of view is filled.
4. Remove eyepiece and adjust microscope iris until its edge is seen just within the back lens of the objective.
5. If the light is too intense, insert neutral filters to reduce it. Changing either diaphragm from the correct position just found, will reduce the efficiency of the microscope.

For other methods of illumination and the why of the rules one should read this manual and books on microscopy. The above rules are given to aid the beginner, but cannot take the place of experience and knowledge.

# THE MICROSCOPE



Optical and Mechanical Features of the Microscope.



Cross section of low power objective, 10X.



Cross section of "high dry" objective, 43X.



Cross section of oil immersion objective, 97X.



Attachable mechanical stage. Useful for moving slide when complete specimen is to be explored.

*Fig. 1. The compound microscope showing parts and the path of light through the instrument.*



## 1. Elementary Methods

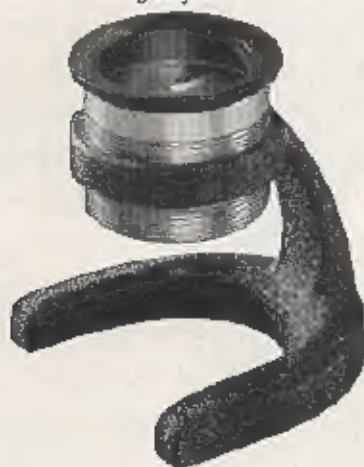
A **Simple Microscope** is an ordinary magnifying glass. Many materials may be examined with the lens held in the hand. When some time is spent studying a specimen, dissecting, or mounting material, it is convenient to have the magnifying glass held on an adjustable stand, Fig. 2. Usually magnifications of less than twenty diameters are used.

The **Compound Microscope** differs from the simple microscope in that it has two separate lens systems. The one nearest the specimen, called the objective, magnifies the specimen a definite amount. The second lens system, the eyepiece, further magnifies the image formed by the objective, so that the image seen by the eye has a total magnification equal to the product of the magnifications of the two systems. The individual or initial magnification of the objectives and eyepieces is engraved on each such part.

The image formed by a compound microscope is inverted; the object is seen upside down and reversed so that the right side is at the left. Movement is reversed also, but one soon learns which way to move the specimen slide.

The names of the various parts of the microscope are shown in Fig. 1. The basic type of compound microscope, Fig. 3, consists of the eyepiece, objective, and a tube which holds them at the proper separation. The instrument may be mounted on any convenient support, is focused by a rack

*Fig. 2. Utility magnifier.*



*Fig. 3. Basic compound microscope.*



and pinion, and used for measuring and reading scales. In the shop they are attached to machines for observing the work done.

To achieve easy portability and convenience of manipulation, the basic microscope is usually mounted on a stand with a stage to support the specimen. A mechanism is provided under the stage, such as a rotatable disc diaphragm or an iris diaphragm, for regulating the amount of light on the specimen. The light may be furnished by a built-in substage illuminator or by an external source. Fig. 4 shows a Spencer Scholar's Microscope, a simple compound type having a built-in illuminator, and Fig. 5 shows a simple microscope and attachable illuminator. These are often used in elementary and high school biology courses.

**Proper use of the Scholar's Microscope** in Fig. 4 is readily accomplished. The stiffness of the focusing control can be immediately adjusted to individual preference by grasping the right-hand focusing knob very firmly and turning the left-hand knob against it. To tighten, turn left-hand clockwise; to loosen, turn it counterclockwise, each viewed from its own side.

Place a specimen slide under the low power objective (the shorter one). Turn the focusing adjustment knob to lower the body tube as far as possible. Illuminate the specimen by plugging the attached cord into a 110-120 volt electrical outlet, and turn on the toggle switch at the right of the instrument. Now look into the microscope, and turn the focusing adjustment slowly to raise the body tube until the specimen is seen, at first fuzzy, and then finally sharp and clear. If there is too much light, so that the specimen can not be seen easily against the glare, turn the disc diaphragm under the microscope stage until a smaller opening (aperture) is under the specimen. There are five apertures of various sizes. In general, one should use an aperture of such size that the field is evenly illuminated.

Once the object or specimen is in focus, it is possible to change objectives (by rotating the nosepiece) with very little refocusing because they have been made parfocal.

Higher power oil immersion objectives are not recom-



mended for use on this type of microscope stand because they need a substage condenser for proper illumination and a fine adjustment focusing mechanism.

The smaller laboratory microscopes, Figs. 5 and 6, have an arm which may be tilted for convenience in use and mirrors for use with daylight or separate light sources. A simple illuminator can be used with a bracket as shown in Fig. 5. The microscope shown in Fig. 6 has the addition of a slow-moving fine adjustment for precise focusing of the higher powered objectives, after the approximate focus has been found with the coarse adjustment. This fine adjustment ceases to work when the objective touches the specimen, reducing the probability of damage to the specimen or objective.

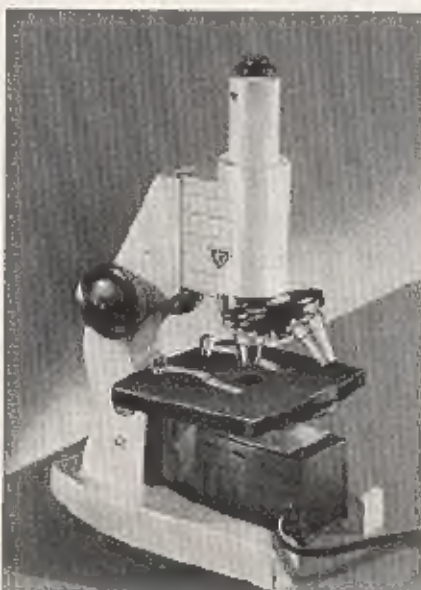
The instrument is equipped with a substage iris diaphragm which may be opened or closed slowly to any sized aperture for illuminating the object. Below the iris diaphragm is a mirror which reflects light from an external source to the specimen. The mirror may be replaced by a bracket to hold a lamp, Fig. 6.

The manner of using the Laboratory Microscope is about the same as the Scholar's Microscope. With a specimen in place, use the low power objective, and, looking through the microscope, move the mirror until light is reflected up

*Fig. 4. Scholar's Microscope with built-in illuminator.*



*Fig. 5. Student Type Microscope with attached substage illuminator.*



*Fig. 6. Student Type Microscope with coarse and fine focusing adjustments.*





the tube and the field is fairly evenly lighted, or remove the mirror and use the lamp. After the specimen is in sharp focus, some readjustment of the mirror may improve the lighting. When the specimen appears to move as the microscope is focused, the light is not passing up the center of the microscope. Correct this by moving the mirror to a more central position.

**Daylight** may be used for illuminating the microscope by turning the mirror so that light from a window is reflected into the microscope. If the *concave* side of the mirror is used, the light is more intense, because the concave mirror acts like a lens to condense the light from the whole area of the mirror onto that covered by the objective. Daylight is of variable quality and not always available. Consequently, **artificial light** is generally used for microscopy. Sunlight, except for special applications, should never be allowed to fall on the mirror or into the lenses of the microscope. It is not good for the microscope and its use is likely to injure the eye of the observer.

Two kinds of **microscope illuminators** are in common use. One is a simple lamp which has a uniformly illuminated surface of ground or opal glass. The other type has a focusable condensing lens to project an image of the lamp filament into the microscope. The use of the latter type will be discussed in Chapter 6. A small light source of the illuminated surface type, Fig. 7, may be placed in front of the microscope, or the mirror may be removed and the lamp set underneath the microscope condenser. The attachable substage illuminator, Fig. 8, is fastened directly to the condenser mounting. A convenient table illuminator is shown in Fig. 9.

The lamp should be moved towards or away from the mirror until the field examined is evenly filled with light. When the concave mirror is used, this distance may easily be determined by placing a pencil on the lamp and then moving the lamp until the pencil point is in focus with the specimen. To make sure that the illumination is good, remove the eyepiece from the microscope and look at the back lens of the objective. This lens should be evenly and completely filled with light. If not so filled, the lamp and mirror should be





*Fig. 7. Bakelite substage lamp.*



*Fig. 8. Attachable substage illuminator.*

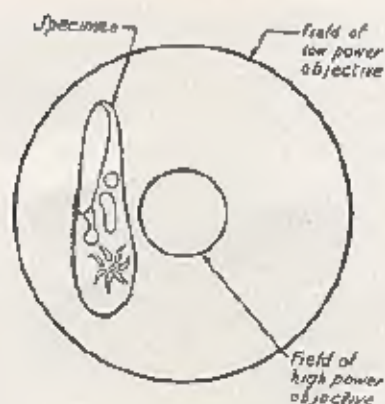


*Fig. 9. Table microscope illuminator.*

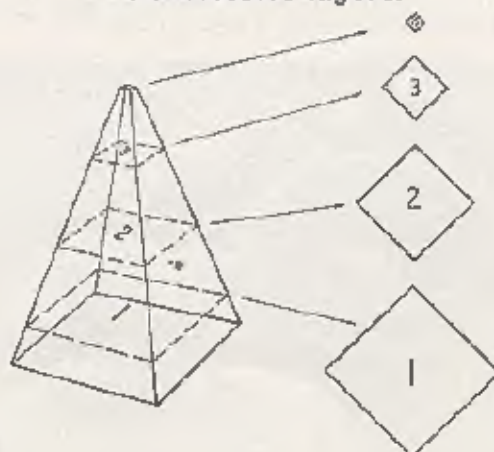
readjusted until the best illumination is obtained.

Greater magnification is accomplished by using lenses of higher power. In order that the total size of the microscope itself need not be increased, the field seen by the higher power lenses must be smaller than that covered by the lower power eyepieces and objectives. As illustrated by Fig. 10, unless the object is carefully centered when looking at it with the low power, it may not be seen when a higher powered objective is turned into place by rotating the nosepiece. Modern objectives are centered and parfocalized when used on a revolving nosepiece. When the low power objective is in focus it is possible to turn the next higher power objective into position by rotating the nosepiece and see the object in

*Fig. 10. Incorrectly centered object not in field of higher power objective.*



*Fig. 11. Depth is seen as successive layers.*





nearly correct focus. A slight turn of the fine adjustment will bring the image into sharp focus.

As the microscope is focused up and down on a specimen, it will be noticed that only a thin layer of the specimen is in focus at a time. If one were looking at a semi-transparent pyramidal object, Fig. 11, the base would be seen as a large square and smaller and smaller squares will be seen as the microscope is focused upward. The greater the magnification, the thinner is the layer in focus at one time. In order to understand the nature of the specimen, it is necessary to focus up and down until the picture of depth within the specimen is built up in the mind's eye.

The Microstar Microscopes are of a modernized bar type of Universal Microscope popular for some two centuries. The basic stand, Fig. 14, has a focusable stage, rigid arm to lessen vibration and provide easy carrying, and comfortable low focusing controls. The body tube can be rotated so that the focusing controls are near to or away from the user, or turned to the side when two persons are working together. Single inclined or vertical tubes for photography, inclined binocular body, or trinocular body with a 35mm camera are interchangeable by merely loosening the set screw on the side of the arm. The stage may be removed by loosening the set screw at the front of the stage and lifting it off the support so that it is possible to use a plain stage, a square stage with built-on mechanical stage and low motion control or more elaborate stages may be placed on the instrument at

*Fig. 12. The condenser is easily removed and replaced in a fork mount.*

*Fig. 13. Abbe condenser N.A. 0.66.*



will. The mechanical stage comes with either right or left hand controls. The base of the microscope may carry a mirror when an external source of light is to be used or another base may be substituted for it which contains a built-in light source. The attachable light source, Fig. 15, may be used. The substage and rotating nosepiece take all of the usual microscope accessories.

The Autofocus mechanism is built-in and can be adjusted with a  $\frac{1}{16}$ " Allen Wrench furnished with the microscope. The wrench is inserted in the opening just back of the stage, Fig. 18, and turned to limit the excursion of the focusing control.

Tension on the coarse adjustment and substage can be loosened or tightened to suit the need of the user by grasping the coarse adjustment controls with both hands and turning them in opposite directions.

The excursion of the mechanical stage is limited in the  $\times$  direction by a rotatable knurled washer at the back of the mechanical stage. Rotating this will clear the movement so the stage may be turned back towards the arm when large preparations are examined. When large specimens are examined or very low magnification objectives used, this washer should be set to prevent the mechanical stage running back and catching on the base as the stage is lowered for such preparation.

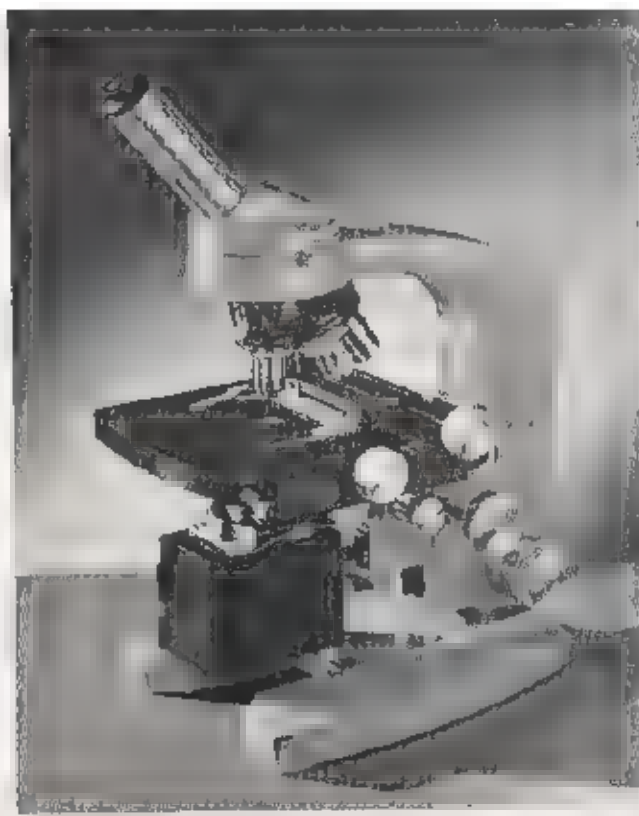
The excursion of the substage is controlled by another screw which can be reached through the opening on the under side of the substage bracket and the same Allen Wrench used for raising or lowering the limit stop, Fig. 12.

Different amounts of magnification are obtained by using appropriate combinations of available objectives and eyepieces. The lower the magnification used, the brighter the specimen will appear and the greater will be the depth of focus and size of the field seen. As the magnification increases, the field seen becomes smaller, the depth of focus is less, and more light is required to see the specimen. The table in Chapter 6 gives some of this data. It is preferable to use the lowest adequate magnification.





*Fig. 14. Microstar monocular microscope with focusable stage and low focusing adjustments.*

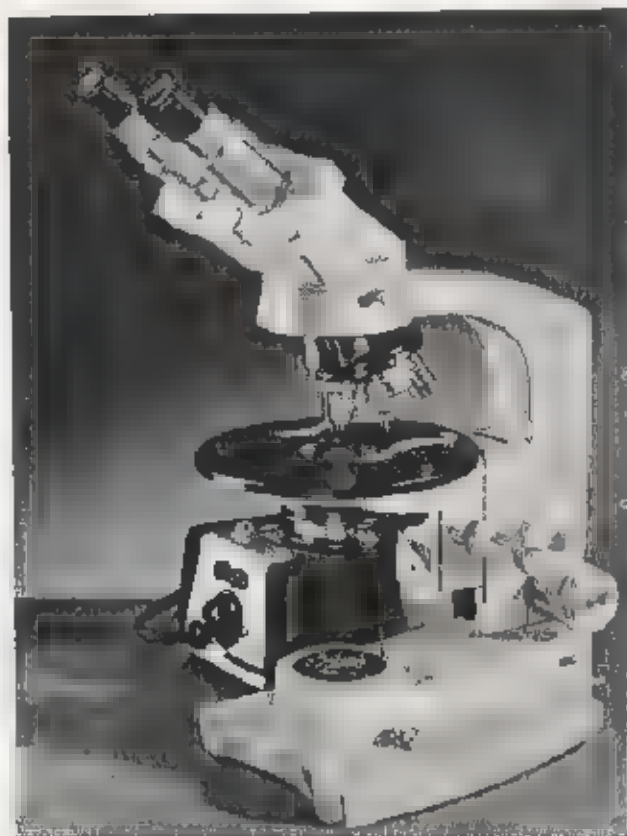


*Fig. 15. Microstar monocular microscope with attached illuminator and mechanical stage.*

*Fig. 16. Microstar binocular microscope with quadruple nosepiece and auxiliary substage condenser.*



*Fig. 17. Microstar binocular microscope with integral illuminator base and variable transformer.*



It is not possible to fill the back lens of a 4mm (high dry) objective adequately with light unless a **condenser**, Fig. 12, is added to the microscope. The condenser brings the light from the mirror to a focus on the specimen, as shown in the diagram, Fig. 1, and it extends it from the specimen with a sufficiently wide cone to fill the back lens of the objective. The condenser has adjustments for raising and lowering it and an iris diaphragm aperture adjustment at the lower end. With daylight or a surface illumination type of lamp, the condenser is raised or lowered until the field is as evenly illuminated as possible. The iris diaphragm is opened or closed until the back lens of the objective, seen when the eyepiece is removed, is filled uniformly with light. The *plane or flat side* of the mirror should be used with the condenser. When the microscope is used for medium power work without the oil immersion objective, a simpler condenser, Fig. 13, may be used. Proper condensers for the objectives of still higher magnification are discussed in Chapter 6.

Better vision results when it is possible to use both eyes simultaneously. A **binocular body** on the microscope, Fig. 16, permits the use of both eyes and gives some appearance of depth, although true stereoscopic vision is not obtained ordinarily with this body and a single objective. The binocular bodies usually have inclined eyepiece tubes for greater comfort of the user. The binocular body has two adjustments. One changes the distance between the eyepieces until both eyes see a single field. This is an interpupillary adjustment which sets the centers of the lenses in the two eyepieces at exactly the same distance apart as the centers of the observer's eyes. The other adjustment compensates for any difference between the observer's eyes. To make this adjustment, the microscope is focused so as to be sharp to the right eye. Then the right eye is closed and the adjustment on the left eyepiece turned until the image is equally sharp for the left eye. Then both eyes should see the same image equally well.

The amount of light to each eye is less than the amount passed by the monocular body tube, because an equal portion of the light is deflected to each eye and there is some





*Fig. 18. Autofocus  
mechanism adjusts with  
Allen Wrench.*

loss of light from absorption and reflection in the prisms of the binocular body. With dense specimens more intense illumination may be necessary. (See Chapter 6.) The binocular bodies are interchangeable with monocular bodies. By loosening the set screw at the side of the arm, the body may be removed. Tightening this screw locks the bodies into proper alignment with the optical system. (Earlier models have this locking screw at the top or bottom of the arm.)

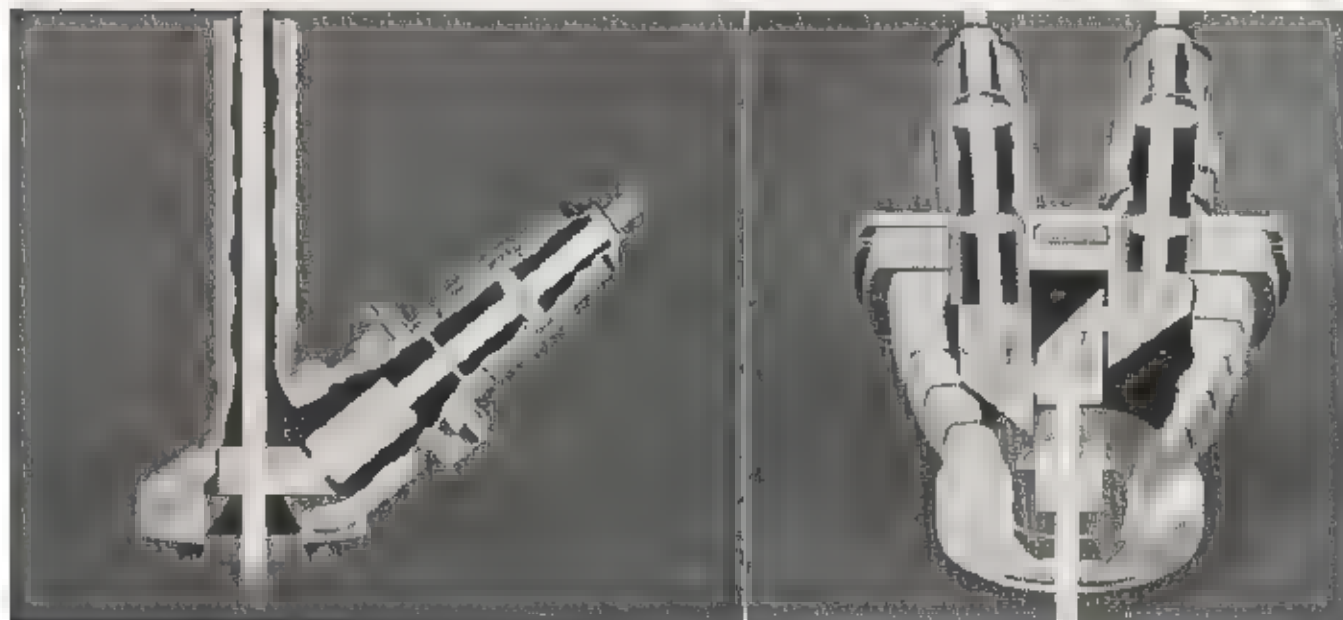
The oil immersion objective found on the more complete microscopes requires more careful use than the others. In order to show the detail of which it is capable, a wider illuminating cone is needed and the illumination required is beyond the angle which can be obtained unless the spaces between the objective and the cover glass and between the slide and the condenser are filled by a suitable immersion oil of nearly the same refractive index and dispersion as the glass of the slide and lenses. Crown and cedarwood (not leaf) oil are satisfactory. (*Cf.* p. 22). Before turning the oil immersion lens into position, place a small drop of oil on the slide in the center of the field, or as some operators prefer, on the front surface of the objective lens. Then bring the lens into place slowly so as to prevent the formation of air bubbles in the oil. The condenser diaphragm will have to be opened in order to fill the back lens of the objective adequately with light. The full amount of detail which may be resolved with this objective is not obtained unless there is also an oil contact between the condenser and the under side of the slide. Efficient use requires that a drop

of oil be placed on the condenser when it is racked down so that when the condenser is brought back into place the oil fills the space between the condenser and the slide. (See Fig 36 a & b in Chapter 6). When full resolution is not required, the condenser may be used dry.

The oil immersion objective focuses very close to the specimen. Unless No. 1 or  $1\frac{1}{2}$  cover glasses are used, it may not be possible to bring the lens close enough to focus on the specimen. Considerable care is necessary not to damage the lens by rough handling. After use the immersion oil must be wiped off with lens paper.

The fine adjustment is graduated and may be used to approximately measure vertical distance. Focus on the bottom and then on the top of the specimen, and read the difference on the scale. When the measurement is not made in air the difference must be multiplied by the refractive index of the material measured. The indices of refraction of some common mounting materials are: balsam and damar 1.52-1.54, cedar oil 1.52, Clarite 1.54, glycerine 1.46, Hyrax 1.73±, StyraX 1.58±, water 1.33. It is desirable to turn the fine adjustment in only one direction during a single measurement. Avoid measuring at the extremes of the fine adjustment. The precision will depend on the model, the wave length of light used, the accommodation of the observer's eyes, the depth of field of the objective and, unless special precautions are taken, may not be much better than ±15%.

*Fig 19 Left, light path through trinocular body Right, light path through binocular body.*





## 2. Preparation of Materials

Few materials may be examined with the microscope as they occur in nature. To be seen under the microscope the specimen must be thin, or sufficiently transparent to transmit enough light for observation. Only the surface of specimens not sufficiently transparent or translucent can be examined. Some general directions are given for specimen preparation and key references and sources of bibliography for more detailed study are listed in Chapter 10.

**Dry preparations** have limited possibilities for microscopic examination. They are usually examined with low magnification using light placed above the stage. For this type of work the stereoscopic microscope is particularly useful. Diatoms and similar materials may be mounted dry on a slide under a cover glass to take advantage of the difference in refractive index between them and air. Small microorganisms, e.g. bacteria, may be smeared on a slide, allowed to dry and examined with or without staining. Metal surfaces and minerals, after proper polishing, are usually examined dry.

Many **temporary preparations** reveal more detail after they are mounted in a drop of water and covered by a thin cover glass. The cover glass is necessary to prevent the liquid from getting onto the surface of the objective and also to give a flat surface so that the light enters the objective. The rapid evaporation of water is annoying and other fluids, like glycerine, when they will not injure the specimen, may be used instead of water. While examining water mounts, it is wise to add a drop of water to the edge of the cover glass from time to time to replace that lost by evaporation. As the water evaporates the cover glass is drawn down toward the slide and may crush or injure the specimen.

A convenient temporary preparation may be made by smearing a very small amount of petrolatum jelly around the edges of a cover slip and inverting the cover slip onto the material within a drop of liquid on the microscope slide. By pressing down on the edges with a dissecting needle or other object, the preparation is sealed and can be pressed

out until it is as thin as possible without damaging the specimen. Such preparations are specially good for phase and for interference microscopy. Living materials mounted in an appropriate medium, as normal saline, may survive for longer periods of observation.

**Permanent preparations** are made by mounting the specimen in a transparent material underneath a cover glass. Dry specimens may be mounted as they are found. Any moisture in a specimen must be removed before mounting in media like Balsam, Clarite or Damar by dehydrating the preparation with alcohol, dioxan, or other suitable chemical. Balsam solutions may be slightly acid and fade the dyes in time. Synthetic resins are replacing the natural gums to a considerable extent. When dehydrating the specimen would damage it unduly, it may be mounted in glycerine jelly, or other aqueous medium.

Specimens for examination may be *selected* from a mass of material by means of a forceps or, if in a liquid preparation, by means of a capillary pipette, made by drawing out in a hot flame the tip of a medicine dropper. If a bit of plant or animal tissue is placed in a drop of water it may be *teased* apart by means of two dissecting needles until some of the parts are separate and small enough for examination with the microscope. Harder materials are prepared by *crushing*, and then sifting out the parts desired. Another form of separation is to place the material in a bag of cloth and to knead it under water so that the part not desired will separate out and may be washed away.

Some materials are separated by *filtering*. *Sedimentation* is another common method for separation of materials. A mixture is suspended in water or other liquid and allowed to settle. The coarser particles settle out rapidly and the finer particles more slowly. By taking a sample at varying heights within the column or at various times, it is frequently possible to get suitable sized specimens for examination. Such methods are often used with abrasives or with soils.

*Selective solubility* with various chemicals is a convenient method of removing the material not desired. For instance,



cloth may be treated with alkali to dissolve the wool and leave the cotton fibre so that the proportion of the two materials may be estimated. *Chemical methods* have been devised, and it is possible to make chemical analyses under the microscope. In fact, this procedure has many advantages as only very small amounts of both the unknown and the reagent are required, and because small amounts of solvent are used, the reaction may be observed in concentrated solutions. The reactions are often clearer than macro procedures with more dilute solutions.

Oils or solvents are used as mounting media to *clear* the material not desired. For instance, in studying adulteration, mounting in paraffin or clove oil may make starch transparent so that crystals or other materials present may be seen.

Other useful methods include differential swelling, step-wise dehydration, incomplete salting out, and isothermal distillation.

Many specimens have to be *sectioned* before they are thin enough for examination under the microscope. Hard materials, like rocks and metals, have to be sectioned with a diamond saw or other type of cutting machine, ground down to thinness and polished for examination. Metal surfaces often require chemical etching to reveal the detail.



Fig. 20.  
Left—A  
table microtome.

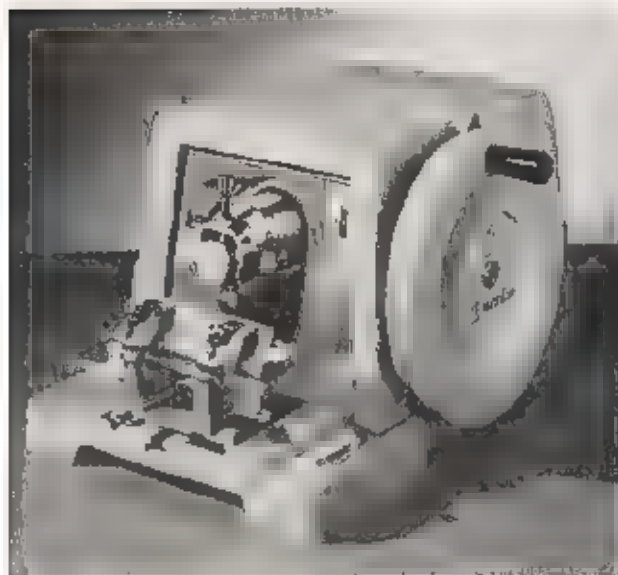


Fig. 21.  
Right—Clinical  
microtome with  
freezing attachment.

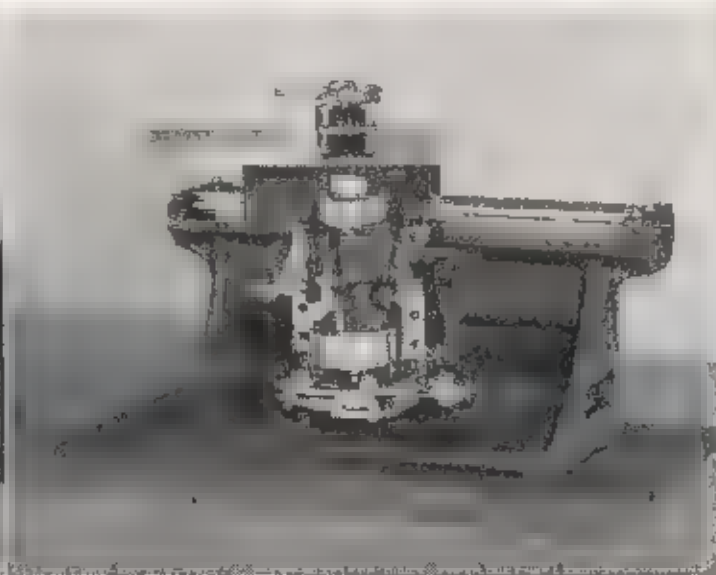
Less solid materials may be *frozen* and sectioned with a freezing microtome, Fig. 21. The specimen is mounted on the cutting chamber and frozen with carbon dioxide gas. Other materials are dehydrated and thoroughly saturated with paraffin, celloidin, or other supporting medium, and, after this has hardened they are cut to desired thinness. A **rotary microtome**, Fig. 22, is used for cutting paraffin and other preparations that form a ribbon. Fig. 23 shows a **sliding microtome** which has the greatest general utility as it may be used for delicate specimens imbedded in celloidin, or for cutting large and difficult specimens.

Skillful preparation of materials is of fundamental importance. If a specimen is badly prepared the most expert microscopist may not be able to identify it or make out its structure. Learning the technic of preparing specimens, like learning all technics, usually requires the making of all the mistakes once. It is a field in which skill increases with practice, and the beginner should not feel discouraged if his first efforts are not entirely successful. While it is possible to learn technic from the study of books, it is an easier and shorter process to learn from watching another skilled person and from study under supervision.

*Fig. 22. Precision rotary microtome.*



*Fig. 23. Precision sliding microtome.*





## Immersion Oil

An immersion medium in microscopy provides an optically homogeneous path between the cover glass and the front lens of the objective. The early recognition of suitable optical properties in cedarwood oil has made it a traditional standard for immersion media. Consequently modern immersion lenses have been designed for use with this medium or one of closely similar optical properties.

In addition to a suitable refractive index and dispersion, a satisfactory immersion oil must possess the following physical properties: It should be chemically inert. It should be free from a tendency to spread or creep. It should remain fluid and not harden rapidly when exposed to air. Its optical properties should be stable and not change with age.

Immersion fluids recommended for use with AO Spencer homogeneous oil immersion objectives are: Cedarwood Oil prepared by us for use with AO Spencer objectives, Crown Oil or Shillaber's oil available from us and most scientific supply houses.

Other fluids should not be used for immersion objectives unless they possess the characteristics mentioned above.

Paraffin oils have low refractive indices and are not recommended.

Methyl Benzoate should never be used because its low dispersion destroys the color correction of the oil immersion objectives.

### 3. The Care of the Eyes

With proper care the microscope may be used for hours at a time without undue fatigue. To be comfortable, have the microscope on a table at such a position that you may look into it without stretching or cramping the body. Use both eyes with the binocular body or alternate the eyes when using a monocular body tube. The eye not used should be kept open to avoid tiring the muscles by trying to hold it tightly shut. At first you will be bothered by seeing with the eye not looking through the microscope, but a very little practice will permit you to keep both eyes open and see with one. Holding the hand in front of the other eye and gradually taking it away will help one become accustomed to working correctly. Ideally the room light, or light at the work table, should be nearly as bright, but no brighter, than the observed microscope field. Sunlight should not be used except for special applications, or darkfield microscopy.

It is important that the amount of light be adjusted so that there is enough to see the object without strain and yet not have unnecessary light to cause fatigue from glare. Continual use of the fine adjustment will afford the greatest comfort in observation.

For best vision with binocular bodies the distance between the eyepieces should be adjusted carefully until both eyes see the same field. Different eyepieces have the eyepoint at different levels; which may require readjustment of the interpupillary distance when eyepieces are changed.

#### Spectacles and Eyeglasses

Spectacles and eyeglasses used to correct near or farsightedness need not be worn when using the microscope. The microscope is merely focused differently with the fine adjustment. However, if the spectacles have a correction for astigmatism it is desirable that they be worn to avoid headaches. Corrections for changes in vision due to old age (Presbyopia) need not be used for observation through the microscope, but are usually necessary when using the Camera Lucida or



reticules for drawing, counting or measuring.

When spectacles have decentered lenses or prisms, it is necessary that they be used with a binocular body to avoid eyestrain. This is also true if there are corrections for size (Aniseikonia). If in doubt, or if there seems to be a feeling of eyestrain when using the binocular body, it is preferable to wear one's regular spectacles. High eyepoint oculars are available for 5 and 10X.

The eyepoints of high magnification oculars are too close to the upper lens to permit wearing of spectacles. When these must be used for long periods of time, it is possible to have a spectacle lens made and mounted in caps to be placed above the eyepieces. This requires a special prescription, because when the distance from the spectacle lens to the eye is changed, it is necessary to change the power of the lens in order to maintain the same degree of good vision. When spectacle caps are used, some provision must be made for locking them on the microscope so they will not become rotated; otherwise, proper correction will not take place and considerable eyestrain is induced.

## 4. The Care of the Microscope

Successful microscopy requires skill and the proper care of the instrument. The microscope is a precision instrument made from valuable materials by expert workmen. With reasonable care it will last a long time, but a single bit of carelessness may ruin it.

The microscope should be carried by its arm and, when not in use, should be placed in its case or properly covered to protect it from dust. When the microscope is brought from a cold to a warm room it should be allowed to warm up gradually before being used.

The lenses must be kept meticulously clean. Dust should be loosened and brushed off with a camel's hair brush and the lens cleaned with lens paper. Optical glass is generally softer than window glass and is easily scratched by ordinary cloth or when dust particles are not removed before polishing. Special lens paper is available and it is poor economy not to use it.

Dust on the eyepiece lenses is seen as specks which rotate when the eyepiece is turned while looking through it. Dirt on the objective prevents clear vision and the object appears as if it were in a fog. If a wet preparation touches the objective lens, the lens will have to be cleaned before one can see clearly through it. An eyepiece should always be kept in the tube to prevent dust from collecting on the back lens of the objective or on the prisms. If it does collect there, clean it off carefully with a camel's hair brush or blow it off with an aspirator. An all-rubber ear or infants' enema syringe, obtainable at most drug stores, is a useful aspirator. Do not use one with a metal tip; to avoid scratching the glass surfaces.

Should dust settle on the prisms or on the glass protection plates of the binocular body, blow it off with air from an aspirator. Blowing the breath on lenses will cover them with minute drops of saliva which are removed from the lens with difficulty. Compressed air from laboratory pipes may contain traces of moisture or of oil from the compressor, and



should not be used unless an absorbent cotton filter is placed on the discharge tube.

If the field does not appear clear, it is well to examine the lower surface of the objective with a magnifying glass. Any dirt or damage to the lens may then be seen easily.

Objective lenses are carefully adjusted at the factory, and should not be taken apart except where they have been made to separate (*e g.* the divisible 16mm objective and the older style immersion objective with funnel stop). The definition depends on all of the component lenses being centered and the right distance from each other. If they must be taken apart, it should be done at the factory where facilities are available for testing the reassembly.

The dry objectives, the condenser, and the eyepieces may be cleaned with distilled water when a liquid is necessary; an immersion objective and condenser top lens with xylene. Only the smallest amount of solvent should be used and the lens should be wiped dry with fresh lens paper immediately after cleaning. Should the immersion oil become gummed on the lens it should be cleaned off with the least amount of xylene and then the excess wiped off promptly with lens paper. Do not soak the lens with xylene or other solvent because the mounting of the lenses may be damaged if it gets beyond the seal of the front lens into the objective.

Extreme care should be used in cleaning the surfaces which have Americote or other anti-reflection coatings. The best procedure, where these are exposed, is to gently brush off the dirt, using a soft camel's hair brush. When this does not clean the surface of prisms, they should be cleaned only by a competent person. The coated surfaces are softer and more readily damaged than the uncoated surfaces of ordinary lenses.

In tropical regions mold will grow on dirty lens surfaces when the relative humidity and temperature exceed 80°F. When the optical surfaces are kept clean, mold growth can be avoided, or minimized, by keeping the optics in a dessicator, or the microscope in a warmed cabinet.\* Other suggestions include the use of radium or fungicides.†

The surface of the microscope is finished with enamel or metal plating and requires little more care than keeping it clean and free from dirt. These finishes resist most laboratory chemicals and ordinarily a little mild soap and water is all that is necessary for cleaning.

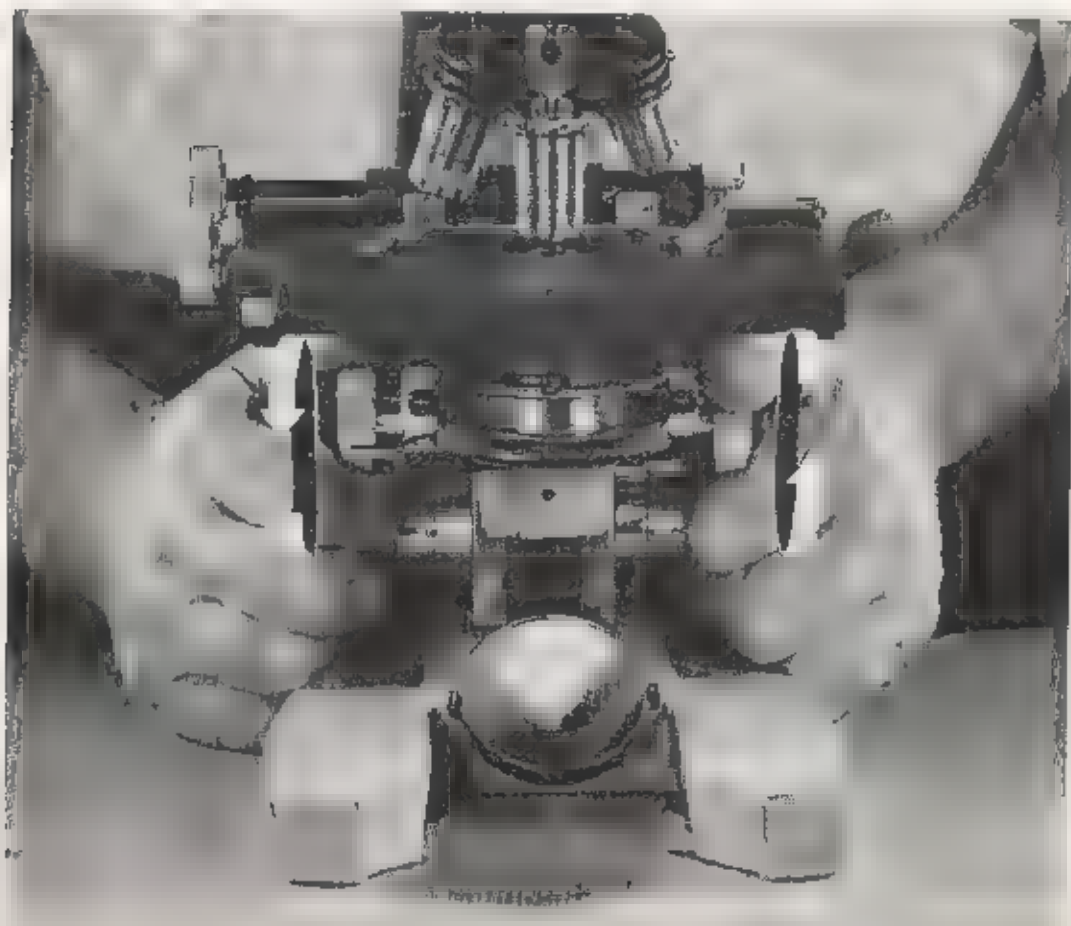
The slides of the rack and pinion should be cleaned occasionally with a small amount of oil or light grease. The fine adjustment does not require oiling. After a time wear may make the coarse adjustment turn too easily to support the body tube. To increase the tension grasp the control knob of the coarse adjustment with the right hand and turn the knobs in opposite directions, Fig. 24. To reduce the friction

\* Hutchinson, W. G. *Sci. Mon.*, 1946, 63:165-177.

† Turner, J. S., McLennan, E. I., Rogers, J. S., & E Matthaei *Nature* (London). 1946, 158:460-472.

Vicklund, R. E. *Ind. & Eng. Chem.* 1943, 38:774-779.

*Fig. 24. Adjusting tension of coarse focusing knobs.*



turn the knobs in the other direction. A similar adjustment is possible for the substage adjustments of the Microstar Microscopes. (With former models the paired screws at the top of the stand may be tightened slightly to give sufficient friction to hold the body tube properly.)

Careless handling or dropping may disturb the adjustment of the optical parts of the microscope. If the instrument does not seem to perform properly and there is no dirt on the objective or the eyepiece, it may mean that some of the prisms have become shifted. Do not attempt to adjust any of the prism systems but rather send the instrument to the factory where tools and tests are available for adjustment and for making certain that the adjustment has been done properly.

Testing microscope lenses is a difficult task, and one which should only be attempted by a skilled microscopist. Instructions for the use of test plates and test objects are given by Beck (1938), Belling (1930), and Spitta (1920). Adequate comparison requires the best illumination and adjustment of the microscope and considerable experience with lenses of different quality so that definition and aberrations may be evaluated. (Cf. also Chapter 6.)



## 5. Accessories for the Microscope

The **mechanical stage** is one of the most useful accessories. It is a mechanism for moving the specimen by rack and pinion or screw movement slowly in either of two mutually perpendicular directions. Mechanical stages may be obtained built into the research microscope, or added on and easily removable from the laboratory microscope, or they may be bought separately and added to most square microscope stages (Fig. 25). The mechanical stage is particularly helpful when it is necessary to search a specimen to make certain that no part has been missed; for instance, examining a stained sputum smear for tuberculosis bacteria. The mechanical stage is helpful also when counting or measuring. The position of a field to which reference is to be made later, may be marked on the label of the slide by the position of the indices and verniers on a graduated mechanical stage.

Petrographers and critical microscopists who require their objectives precisely centered with respect to the optical axis of the microscope, prefer the **quick-change nosepiece**, Fig. 26, to the rotating nosepiece. The quick-change nosepiece has individual centering screws so that each objective may be centered and once centered may be quickly taken off and replaced to the same position.

Two people can see the same field at the same time when the **demonstration eyepiece**, Fig. 27, is used. Spencer Demonstration Eyepieces may be obtained with a built-in pointer

*Fig. 25. Graduated mechanical stage.*



*Fig. 26. Quick-change nosepiece.*



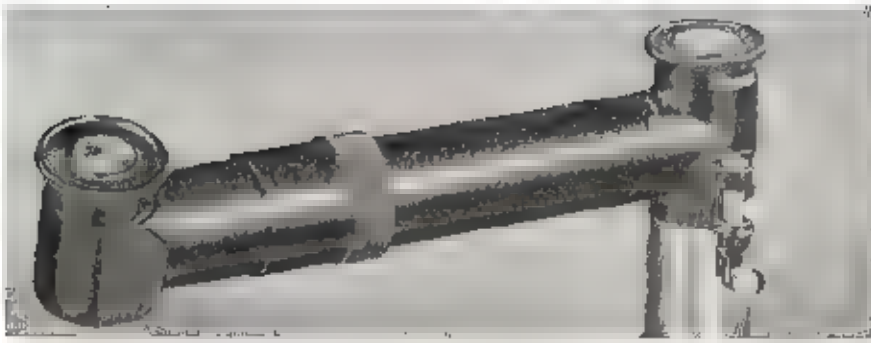


Fig. 27. *Demonstration eyepiece.*

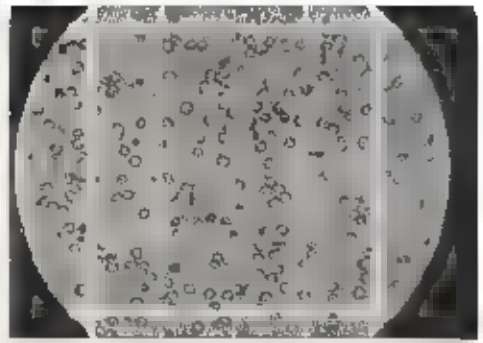


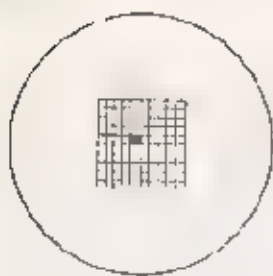
Fig. 28. *Blood cells on Bright-Line counting chamber.*

so that one person can point out a definite region of the specimen examined and both may be certain that they are looking at the same part of the specimen. The demonstration eyepiece is particularly useful in teaching.

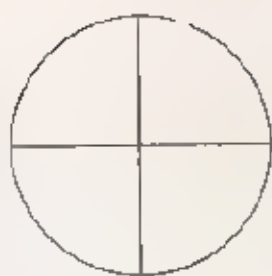
Several kinds of equipment are available for counting. Probably the best known is the hemacytometer. The *Spencer Bright Line Hemacytometer* is filled with diluted blood, and the number of blood cells in the different squares of the ruling, Fig. 28, are counted under the microscope. From these counts the total number of blood cells may be estimated. The counting chamber is made so that the under side of the cover glass is 0.1mm above the ruled surface to control the volume over the ruled area. The Bright-Line counting chamber is also used for yeast, dust, and other counts. The lines are easily and distinctly seen because they are ruled in a metal surface fused in glass.

Another type of counting equipment has a chamber of a definite depth, but instead of having an extensive ruling on the large area, a *ruled reticule* is placed in the eyepiece, Fig. 30a. As one looks into the microscope the ruling is seen in focus with the slide and since the volume is known, the number of organisms or particles may be estimated from the count. This method is used for counting protozoa in water and for dust counting. The Sedgwick-Rafter and Howard Mold Count apparatus illustrate this equipment.

A definite volume of fluid (milk, for instance) may be spread over a known area on a slide. Then a crosshair eyepiece, Fig. 29b, having a diaphragm or etched circle of the proper diameter to give the correct area of view, is placed into the microscope. After the film of milk is stained, the



A



B

Fig. 29-a. b. Ruled reticules for eyepieces.



A



B

Fig. 30-a. b. Measuring reticules for eyepieces.

number of bacteria in the field are counted. The estimate from the count is accurate only when the field of view covers the correct area. This must be adjusted at the factory, so that the diaphragm aperture covers exactly the proper length on a *stage micrometer*. Counting equipment for milk is made in accordance with standards set by the American Public Health Association.

Measuring equipment for the microscope consists of a scale or reticule placed in the eyepiece and calibrated against a standard stage micrometer. Various ruled scales, Fig. 30, may be used in any eyepiece. The top lens of the eyepiece is unscrewed and the reticule is placed with the ruled side down so that it rests on the diaphragm within the eyepiece. Some eyepieces have a diaphragm below the field lens and the reticule is placed, ruled side down, on the diaphragm after it is removed from the ocular. It should then be replaced firmly. When a considerable amount of measuring is done, it is better to have an eyepiece made with a reticule mounted in place. The better ones have an adjustable eye lens so that the scale marks may be focused separately for eyes with or without spectacles.

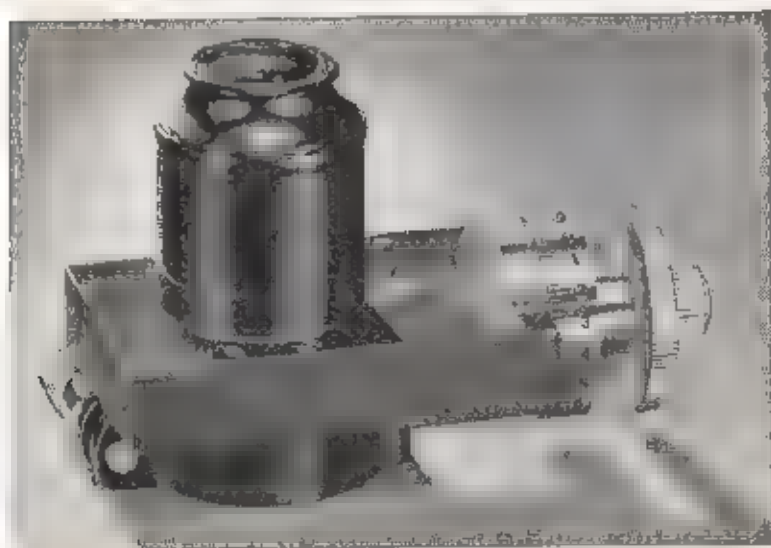
A third type is the **screw micrometer**, Fig. 31, which has a scale moved by a control at the side of the eyepiece. Thus, it is possible to shift the scale which simplifies measurement, and to measure with the outside scale and vernier rather than counting the divisions seen.

All of the scales placed in the eyepieces have arbitrary length, and the apparent length depends on the magnification. Consequently, each scale has to be calibrated for use with each combination of objective and eyepiece. To cali-

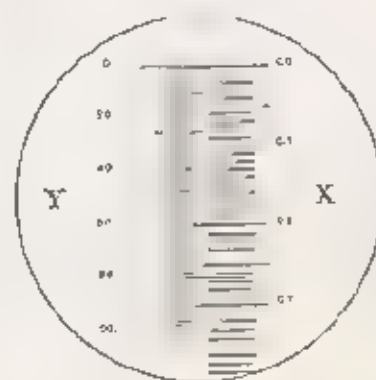


brate, focus on a **stage micrometer** and move it until one of the graduations corresponds exactly with one of the divisions of the eyepiece micrometer, Fig. 32. The true distance ( $x$ ) seen on the stage micrometer, which corresponds to the number of divisions ( $y$ ) of the eyepiece micrometer, is then read and dividing this true distance by the number of divisions of the eyepiece micrometer, we find the distance each one subtends. ( $c = x/y$ ). The number of divisions covered by the specimen multiplied by the calibration constant ( $c$ ) gives the length of the specimen. Once an eyepiece micrometer has been calibrated it need not be recalibrated when used with the same eyepiece, the same objective and the same tube length. If the tube length of the microscope with adjustable draw tube is changed, these values change proportionally, and this may bring the values of the eyepiece scale to an even value. A slight movement of the draw tube causes little loss of definition, but any change in tube length from the correct value of 160mm alters the spherical aberration (and reduces the definition). If small details need not be resolved a certain amount of distinctness in the image may be sacrificed for convenience in calibrating the eyepiece scale. Other accessories will be discussed in Chapter 7.

*Fig. 31. Screw micrometer eyepiece.*



*Fig. 32. Calibration eyepiece reticule*



## 6. Advanced Technic

The critical use of a research microscope requires considerable skill, technic, and an understanding of the capabilities and limitation of microscopes. Some of the essentials of this work are included in this and the following chapters.

The microscope is an instrument of limited capability. The limitations arise in the nature of light used to see the specimen and the nature of the transparent materials available for lens manufacture. A further limitation on visual observation is the limited sensitivity of the human eye (*Cf.* Chapter 7). Because of the wave nature of light and the fact that the different portions of light waves interfere with each other, the image of a bright point of light is a disc and not a point. The bright central disc is surrounded by alternate dark and bright rings forming a diffraction pattern. A lens well corrected for *spherical aberration* concentrates most of the light into the central disc, loses little in the rings and gives a crisp image with good definition.

Light of different colors will focus at different points along the optical axis when a single lens is used; this is called *chromatic aberration*. To bring the colors together lenses of different kinds of glass are combined. For the highest correction crystal fluorite is used as well as glass.

Other aberrations of lenses are coma, distortion, astigmatism, and curvature of field. The residual curvature of field is not serious when the lenses are used visually because the eye is capable of accommodating itself to distance. For photography special eyepieces are desirable to give a flat undistorted field. For details of the other aberrations, texts on optics and microscopy may be consulted.

All aberrations cannot be corrected completely at the same time. Spencer optics are corrected to give the best working balance so that the microscopist obtains a clear and true image of the object examined.

**Magnification alone** is not the aim of the finest microscopes. A given picture may be faithfully enlarged without

showing any increased detail. The enlargement is not helpful unless more detail becomes apparent. Very powerful eyepiece lenses are less useful for visual observation with the microscope. They do not show more detail, and what is seen is less bright because of the increased amplification. The higher powered eyepieces decrease the area of the field seen. That is why a second microscope is not ordinarily used to magnify further the object seen with a microscope. Magnification that does not increase the visible detail is called empty magnification. In some photomicrographic, counting, or measurement problems such magnification may be useful.

The object seen with the microscope appears to be about the same distance away as a book is held when reading average size print. By general agreement, this distance is taken as ten inches. The magnification of the microscope is the ratio of the apparent size of the object as seen through the microscope to the size of the object as it appears to the unaided eye at a distance of ten inches. When the ratio applies to the linear dimensions of the object, it is called linear magnification expressed in *units* known as *diameters*, designated by  $\times$ .

For projection or photomicrography, the image of the stage micrometer is projected onto a screen at the required distance and the magnification directly measured. The visual magnification may be measured with the aid of the camera lucida and a rule placed so that it is ten inches from the top of the eyepiece. Strictly speaking, the measurement should be made from the upper focal point of the eyepiece, but this is usually near enough to the top of the eyepiece that no serious error occurs from neglecting it. The projected image on a screen ten inches from the eyepiece is smaller than the visual magnification obtained with the camera lucida because the eyepiece is serving in a different manner.

**Resolution.** The resolving power of the lens is its ability to reveal fine detail, and is measured in terms of the least distance between two lines or points at which they are seen as two rather than as a single blurred object. Resolving



power is a function of the wave length of light used, the lowest refractive index between the condenser and the objective, and the greatest angle between two rays of light that can enter the front lens of the objective. The numerical aperture ( $N.A. = n \sin u$ ) is engraved on the lenses and may be used to compute the limit of resolution. The least index of refraction of the system is  $n$  and  $u$  is the half angle of the maximum cone of light which can enter the objective lens.

The eye is most sensitive to green light which has a wave length of about 0.55 microns (1 micron,  $\mu$ , equals 0.001mm). The size of the smallest distance between two particles at which they can be seen as two equals the wave length  $\lambda$  of light used, divided by the numerical aperture, when no condenser is used; or, by two times the numerical aperture when the condenser is used to fill completely the back lens of the objective with light. With the low power 16mm objective (N.A. of 0.25), the distance resolved as two points is 1.1 microns with and 2.2 microns without a condenser. The oil immersion objective with an N.A. of 1.40 resolves 0.2 microns with white light. When blue light is used, the resolving power is increased, but it is more difficult to see the specimen. A further increase may be obtained by use of ultraviolet radiation, but it is necessary to use image converters or to record the results photographically, because the eye is not sensitive to this radiation. The resolution for other combinations may be obtained from the nomogram, Fig. 33. The presence of objects too small to be seen directly, because of lack of resolution, may be demonstrated by dark field methods. (Cf. Chapter 7.)

The resolving power of the microscope objective indicates which objective should be used to depict any given degree of detail. However, this does not mean that the details can be seen. Before they may be seen by the eye, they must be magnified sufficiently to be within the resolving power of the eye. Different observer's eyes are not equally sensitive, but in general the magnification should be from five hundred to one thousand times the N.A. of the objective.

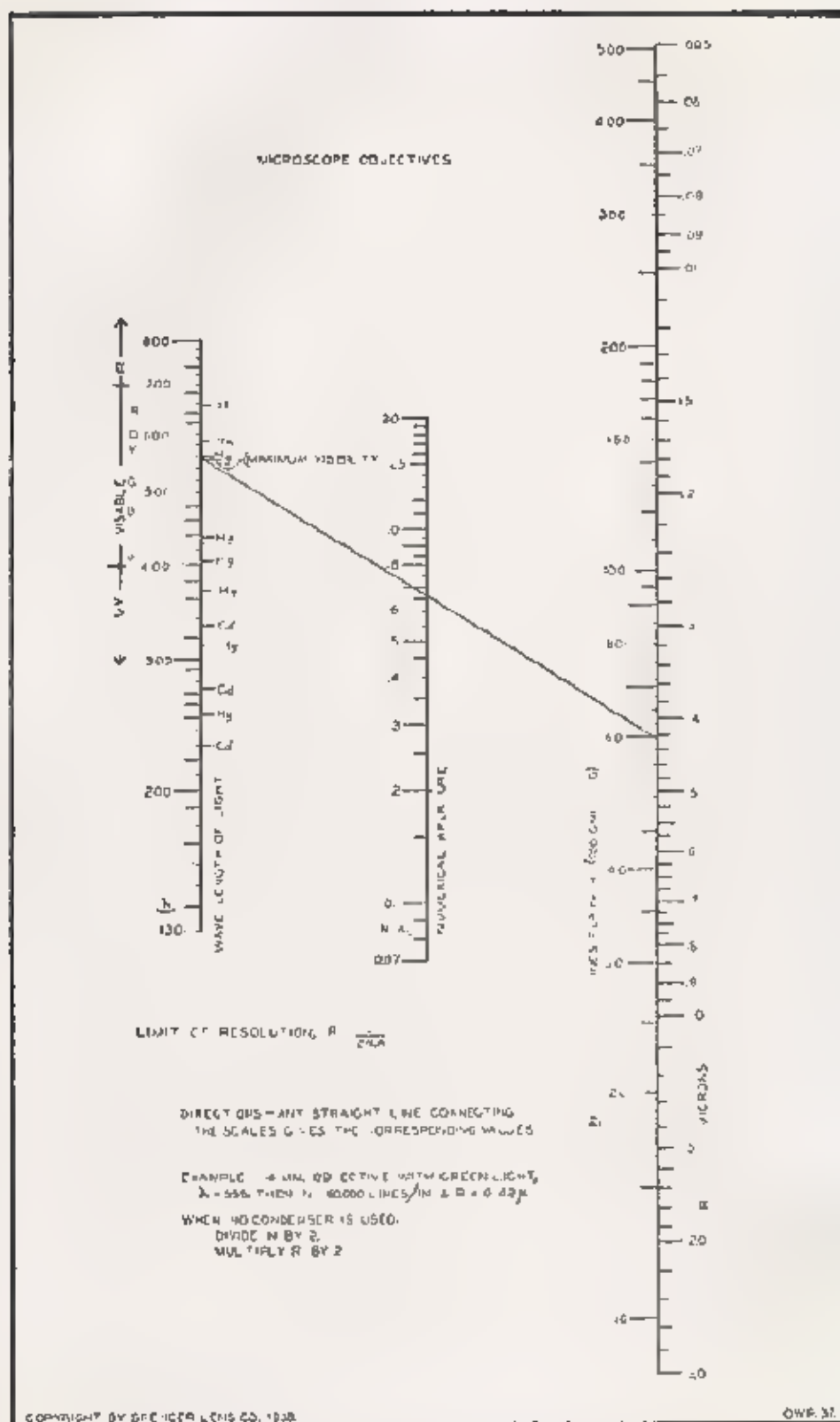


Fig 33. Nomogram for the resolving power of microscope objectives.  
(Tr. Am. Micro. Soc., 1932, 57:916-918)

# AO SPENCER MICROSCOPE OBJECTIVES

## Achromatic Objectives

Cat. No.	Equivalent Focus mm	Initial Magnification	Type	Numerical Aperture	Real Field† mm	Working Distance in mm
101	48	2	Dry	0.08	7.0	52.5
102	40	3	Dry	0.08	6.3	35.2
104	32	4	Dry	0.10	4.0	21.0
105	30	3.5	Dry	0.09	4.2	25.4
107	25	5	Dry	0.14	2.8	16.7
109	16	10	Dry	0.25	1.5	6.8
110	16-32	10, 4.2	Dry (separable)	0.25, 0.10	1.5	6.8, 25
111#	16	10	Dry	0.25	0.30	8.4
112	8	20	Dry	0.50	0.7	1.3
115	4	43	Dry	0.66	0.24	0.78
116#	4	43	Dry	0.53	0.35	0.73
125	3.6	50	Oil Immersion	0.95	0.30	0.37
127	1.8	97	Oil Immersion	1.25	0.15	0.12
1292**	1.8	97	Oil Immersion	1.25	0.15	0.13

## Reflecting Objectives

1200	3.5	50	Dry	0.56	0.30	2.8
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## Apochromatic Objectives

150	16	10	Dry	0.30	1.29	5.2
152	8	20	Dry	0.60	0.60	0.65
154*	4	43	Dry	0.95	0.29	0.15
158	2	90	Oil Immersion	1.30	0.14	0.08
159	2	90	Oil Immersion	1.40	0.14	0.05

\* Furnished in Cover Glass Correction Collar Adjustment Mounts.

\*\* With Built-in Iris Diaphragm.

† Achromats with 10X Huygenian eyepiece, fluorite and apochromats with 10X compensating eyepiece.

# Achromatically corrected.



The **working distance** of a microscope objective is the distance between the front of the objective and the top of the cover glass when it is focused on an average preparation. Numerical data for Spencer objectives are given in the table on page 37.

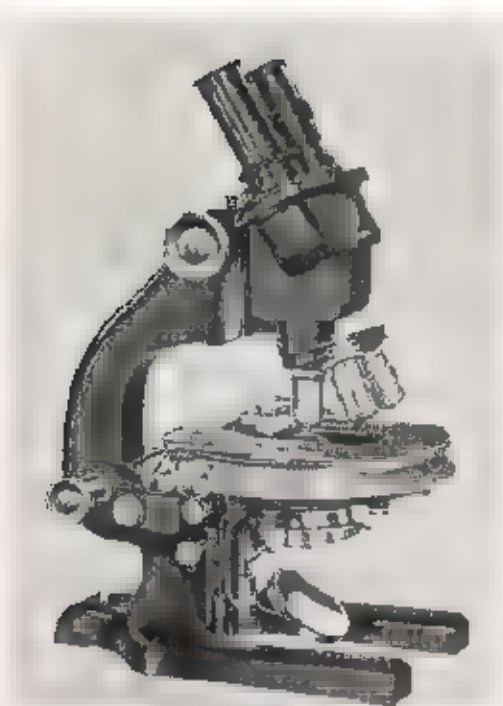
The front lens of some 16mm objectives may be removed, leaving a 32mm lens of lower magnification.

The **depth of field**, or the thickness of the specimen which may be seen in focus, decreases as the numerical aperture and magnification increase. The depth of focus is also decreased when radiation of shorter wave length is used. When very thin sections of the specimen are to be examined, sometimes called optical sectioning, lenses of high numerical aperture should be used. When the general arrangement of the material is to be studied, lenses of longer focal length and less magnification will generally be more satisfactory, despite their lower resolving power, because the image will be brighter and a larger field will be seen. The longer working distance of the lower power objective may also be useful.

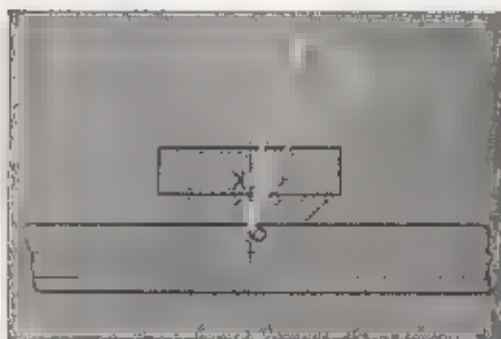
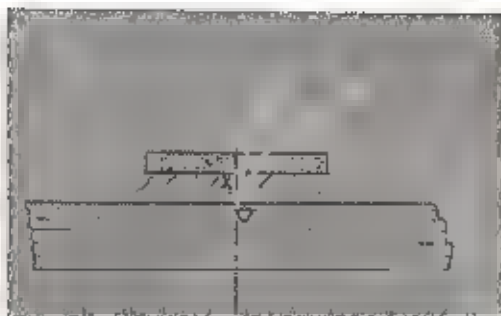
The **amount of light** reaching the eye or the photographic plate is proportional to the intensity of the source, times the square of the numerical aperture of the objective, times the reciprocal of the square of the magnification. The decrease of light according to the inverse square of the magnification is the reason for the recommendation to use the lowest magnification adequate to resolve the detail to be examined.

The research microscope, Fig. 34, is larger and more stable than other models. It has a wide choice of accessories, an improved substage, and a precise fine adjustment which is graduated to one micron and placed low for the user's convenience. It is usually equipped with more fully corrected optics.

Among the most common characteristics of lenses used for microscope objectives are the failure of light of different colors (different wave lengths of the spectrum) to focus at the same point (chromatic aberration) and the failure of light entering near the outer parts of the lens to focus at the same point as light entering near the center (spherical aberration).



*Fig. 34. Research microscope with graduated circular revolving stage.*



*Fig. 35. The apparent position (x) of object (o) depends on cover glass thickness.*

By using different kinds of glass in combination the achromatic objectives, used on laboratory and medical microscopes, are corrected chromatically for two colors of the spectrum and spherically for one color. Further correction of aberrations in the objective requires the use of crystalline fluorite as well as glass. The fluorite or semi-apochromatic objectives are intermediate in correction between achromatic and apochromatic objectives.

Apochromatic objectives are corrected chromatically for three colors of the spectrum and spherically for two. Apochromatic objectives are necessary for the most critical microscopy and color photomicrography. They are used in essentially the same manner as are achromatic objectives. A corrected condenser of numerical aperture equal to or greater than objective aperture is required for best results. Compensating eyepieces should always be used with apochromatic objectives because they complete the correction of the optical system. If ordinary Huygenian eyepieces are used with apochromatic objectives, colored bands will be seen around the objects under observation.

In order to obtain the best image, the high magnification, dry apochromatic objectives are mounted with a correction

collar for adjustment, to compensate for the thickness of the cover slip. The thickness of the cover glass affects the correction for spherical aberration and the apparent position of the specimen, Fig. 35. Spencer objectives without the correction collar are made for use with cover glasses 0.18mm thick, No. 1½ cover glasses. These are available and should be used for critical bright field, phase and interference microscopy. For the sharpest image the collar is set to the known thickness of the cover glass. (It is desirable to measure the cover glass thickness at the time that the slide is mounted and to record it on the slide label.) When the thickness is not known, it can be approximated from the performance of the objective (Belling, 1930). When no correction collar is available, the similar correction may be obtained by increasing or decreasing the length of the adjustable draw tube. The tube length is increased for thin cover glasses and decreased for thicker cover glasses. The oil immersion lenses do not need this correction because the oil makes a homogeneous path for the light to pass from the cover glass over the specimen to the objective.

When spectacles or eye glasses must be worn by the operator, the high eyepoint eyepieces are more satisfactory. They permit the user to see the entire field at one time, while the ordinary eyepieces do not. The wide field eyepiece facilitates the examination of very large areas; for instance, in the study of pathological changes in sections of organs and tissues.

The simple, two-lens, Abbe type of condenser, used on the conventional laboratory and medical microscopes, is not corrected adequately for use on the research microscope. For critical microscopy corrected condensers in centering mounts are used. The three-lens, Spencer wide angle condenser has a numerical aperture of 1.30.

The achromatic and aplanatic condensers should be used with apochromatic objectives for best results. The N. A. 1.30 is a highly corrected condenser, and preferable for all work except with objectives of greater numerical aperture. In the latter case, a condenser with a numerical aperture 1.40 is required. These condensers are centered by closing



the diaphragm until the edge of it is just seen in the back lens of the objective. Using the telescope of the Phase Microscope facilitates the centering. Then the centering screws are moved separately or together until the iris diaphragm is concentric with the opening of the back lens of the objective. When the finest detail of which the objective is capable of showing must be examined, it is necessary that the condenser be carefully centered to the objective used and that immersion oil be placed between the condenser and the microscope slide. Unless the condenser is immersed, the air film reduces the N. A. of the objective to less than 1.0, Fig. 36. For example, with white light the resolution of an objective of 1.40 N. A. is reduced from 0.2 to 0.3 $\mu$ . (Compare Figs. 37 a, b.)

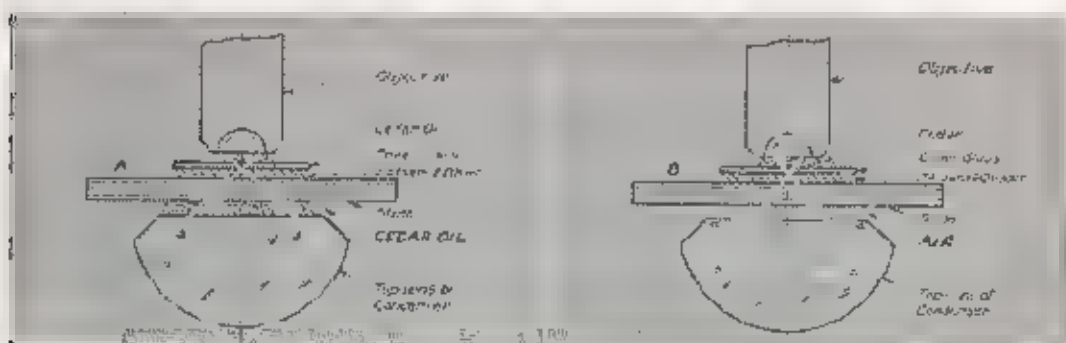
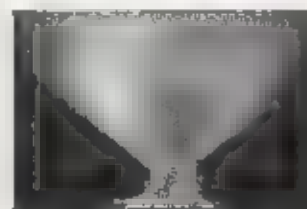


Fig. 36. Reduced illuminating cone when condenser is not in immersion contact with slide.

Fig. 37. Comparative cones of light.



a. N.A. 1.30 with no immersion oil on condenser top.



b. N.A. 1.30 with immersion oil on condenser top.



c. Oblique light.

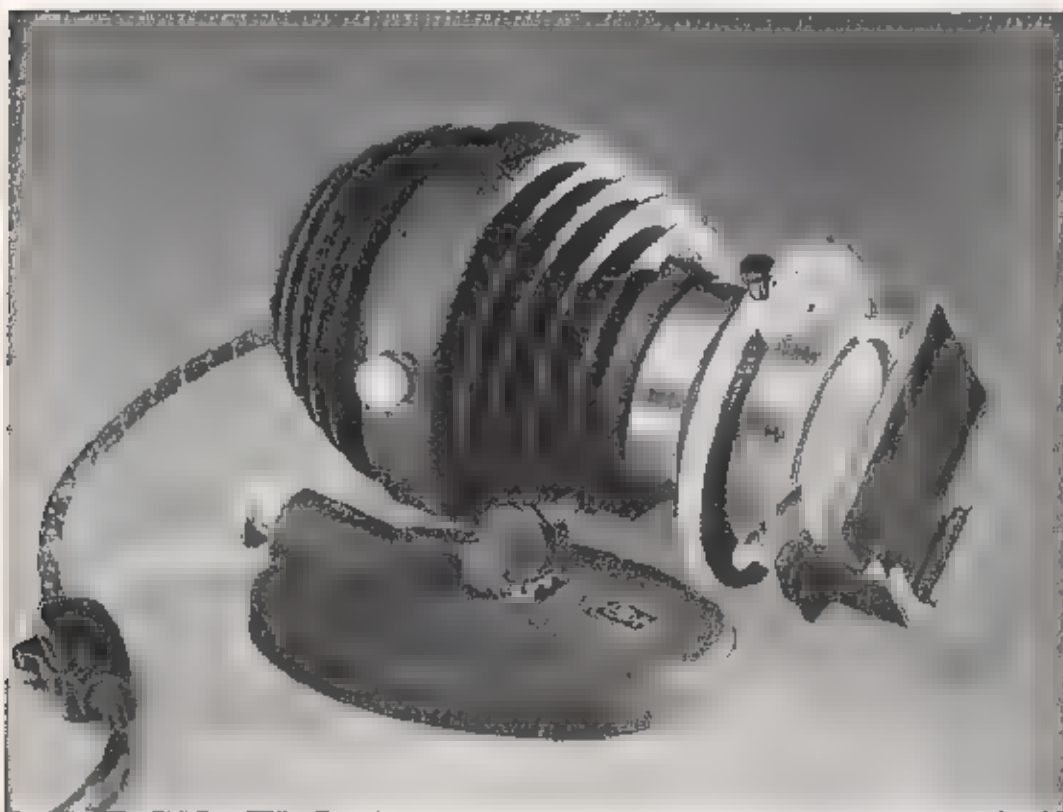


d. Dark field illumination.

The full capabilities of a microscope are not obtained unless the illuminant is efficient. Daylight is not very satisfactory because of its variability. Most critical microscopic work is done with artificial light, and for research work it is necessary to have a lamp with a condensing lens and a diaphragm, Fig. 38.

The lamp may be used in either of two ways. **Critical illumination** (Nelson) was generally used in former times when a white cloud or an oil lamp flame served as a light source. The image of the source is focused by the microscope condenser so that it appears in focus with the specimen, Fig. 39.

The disadvantages of this kind of critical illumination are that the field may be unevenly lighted and it is limited to the size and shape of the source of illumination, *e.g.* the lamp filament. The limitations became serious when the oil flame was replaced by the electric coil filament lamp which would



*Fig. 38. Focusing research lamp.*

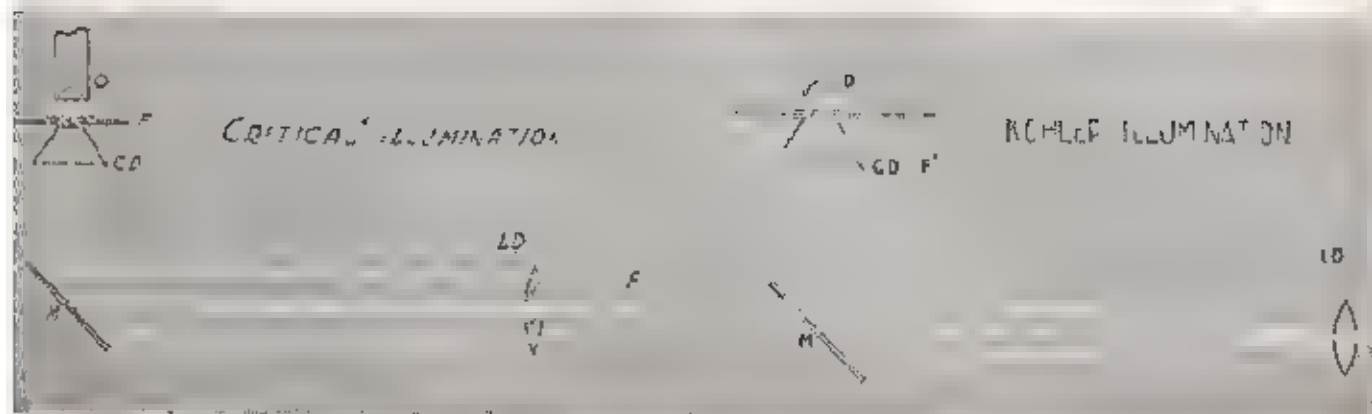


Fig. 39. Critical illumination.

Fig. 40. Köhler illumination.

illuminate only a narrow region when focused on the specimen. Köhler devised a type of critical illumination, which bears his name, to overcome this limitation.

To obtain **Köhler illumination**, Fig. 40, focus the condenser of the lamp so that the filament image is in sharp focus on the diaphragm leaves of the microscope condenser. The diaphragm of the condenser may be seen by looking at the microscope mirror or with an auxiliary mirror held in the hand. Focus the microscope on a specimen and then focus the microscope condenser until the diaphragm on the lamp is in focus with the specimen. Examine the mirror to make sure that the light from the lamp falls on the center of the mirror. The iris diaphragm on the lamp (sometimes called a field stop) is now closed until no more than the field to be examined is illuminated. Now remove the eyepiece and examine the back lens of the objective. The diaphragm of the condenser is an aperture stop and should be opened or closed until the back lens is filled with light. An image of the lamp filament will be observed and this image should be large enough to fill the back lens of the objective. If it is not, move the lamp away from the mirror until the best balance is attained. Unless both diaphragms are thus adjusted, excess light will produce glare, spoiling definition, both visually and photographically.



The illumination is now correct, but the amount of light passing through the microscope may be too intense for comfortable observation. This light must not be decreased by closing the diaphragm of the microscope condenser because that would reduce the cone of light so that it would not fill the back lens of the objective with light. The numerical aperture used, and hence the resolving power, would be reduced under these conditions. Full resolving power is obtained only when the back lens of the objective is uniformly filled with light.

The light may be reduced without decreasing the ability of the lenses to resolve detail by means of neutral density filters placed between the lamp and the microscope. By using one or more filters it is possible to adjust the light so that the object may be seen clearly without fatigue from unnecessary glare. The light from a tungsten filament lamp is yellow and this is usually made whiter by absorbing some of the excess red by means of a blue glass, or better, with a Corning Daylite Glass. The latter adjusts the color temperature of the lamp to very nearly that of daylight, provided that the correct lamp, of proper voltage, is used and lighted by electricity at that voltage. A lower voltage gives a redder and a higher voltage a bluer light.

When properly adjusted the lamp should fill the field and the aperture of the lens used, and the intensity should be adjusted for clearest vision without glare. The highly corrected condensers do not fill the field of the very low power objectives. To fill the field it is necessary to remove the top lens from the condenser, by unscrewing the top lens mount, or using an auxiliary lens, usually mounted under the condenser.

Unless the back lens is uniformly filled with light the diffraction patterns will not be correct and fine details will be distorted. The interpretation of form and of diffraction patterns becomes increasingly difficult and important as the limit of resolution is approached (Beck, 1938). The microscopist will find detailed discussions of the problems of resolution in the books cited in the bibliography.

## 7. Visualization and Special Methods

An object is seen when the light from it reaches the retina of the eye and the resulting photochemical action initiates nerve impulses which are interpreted by the brain. The human eye can see only with radiation from 380m $\mu$  to 740m $\mu$ , and is most sensitive to yellow green light of about 555m $\mu$ . Shorter radiation (ultraviolet) or longer radiation (infrared) cannot be seen by the normal human eye and image translation or photographic recording is necessary. The vision and color sensitivity of different people varies from normal, to deficient, to complete color blindness. It is important that the microscopist know what limitations, if any, his vision has, and he should understand enough color theory to be able to use color filters effectively in microscopy.

If there are two transparent regions of different refractive index in the object examined under the microscope, the light passing through the region of contact will be bent and the shape of the material is interpreted from the bent light or *refraction image*. By this means the refractive index may be determined. The material is immersed successively in fluids of different known index until the boundary between them disappears. When the specimen is of different index there is usually a bright line surrounding the specimen. If this bright line, the "Becke line," moves in toward the specimen as the microscope is raised, the specimen is of higher refractive index than the surrounding fluid.

When the specimen contains planes which reflect light it may be seen in part by the *reflection images*. Transparent materials like tissue cultures are seen as a combination of these two types of images and with the Köhler method of illumination very little detail may be visible. Contrast and, as a result, some detail may appear as the diaphragm of the microscope condenser is closed and the resolving power is reduced accordingly. Such detail may be seen after staining, or by phase or interference microscopy.

When the different parts of the image have different colors then the specimen is seen from its *color images*. This is the usual method of making material visible and many

dyes are used in microscopy. Color filters between the lamp and the microscope may be used to increase the contrast and detail seen in colored specimens. A filter of complementary color increases contrast, and a filter of nearly the same color as the object reveals detail.

Portions of coherent waves of light interfere with each other, making brighter and darker regions called diffraction patterns, and the image seen is a result of these patterns

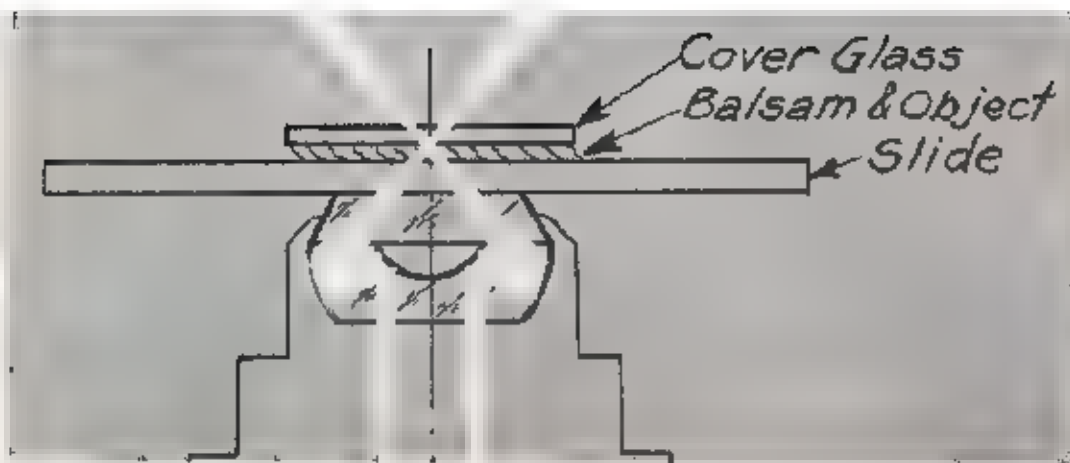
Materials which fluoresce or are affected by polarized light, as described below, also give specific color images which are helpful in visualization.

The image of the object examined with the microscope formed on the retina of the eye is usually a combination of the several different kinds of images, rather than a single one. A working knowledge of the kinds of images assists in the comprehension of what is seen and lessens the likelihood of misinterpretation. Great care is necessary when the object viewed is close to the border line of smallness which may actually be seen with the microscope.

**Oblique Light.** If the mirror of the microscope is swung to one side so that the light passes through only one side of the condenser the specimen is illuminated by oblique light, Fig. 37c. The oblique light attachment is available as a part of the substage of the research microscope. Turning the control knob changes the obliqueness of the light. The oblique beam of light can be moved through an arc of  $90^\circ$  by a corresponding movement of the control handle. Oblique light emphasizes any regular pattern in the specimen. If the light is passed at right angles to direction of greatest contrast the pattern largely disappears and great care is necessary in interpreting the images seen. Oblique light is used primarily in the study of diatoms.

**Dark Field.** The dark field condenser, Fig. 41, has a central dark stop which prevents any direct rays from entering the objective Fig. 37d. The cone of light is focused onto the specimen, which appears as if it were a self-luminous body on a nearly black background. The effect is the same as the well-known appearance of dust in a beam of sunlight. Small bright objects are more readily seen against a dark field than





*Fig. 41. Path of light through a dark field condenser.*

similar small dark objects on a bright background. The dark field method reveals objects smaller than may be seen with bright field, including the presence of particles too small to be resolved. When the particles are of size below the limit of resolution of the objective used, very little can be inferred as to their shape, although the number present and approximate size may be estimated. The more intense the illumination, the smaller are the particles which may be discovered.

A dark field condenser or one with built-in illumination may be substituted for the bright field condenser. Dark field microscopes with hinged substage and permanently aligned illumination are available. In medicine an important use of darkfield illumination is in the diagnosis of syphilis. Dark field illumination is used for the examination of microorganisms and colloidal materials.

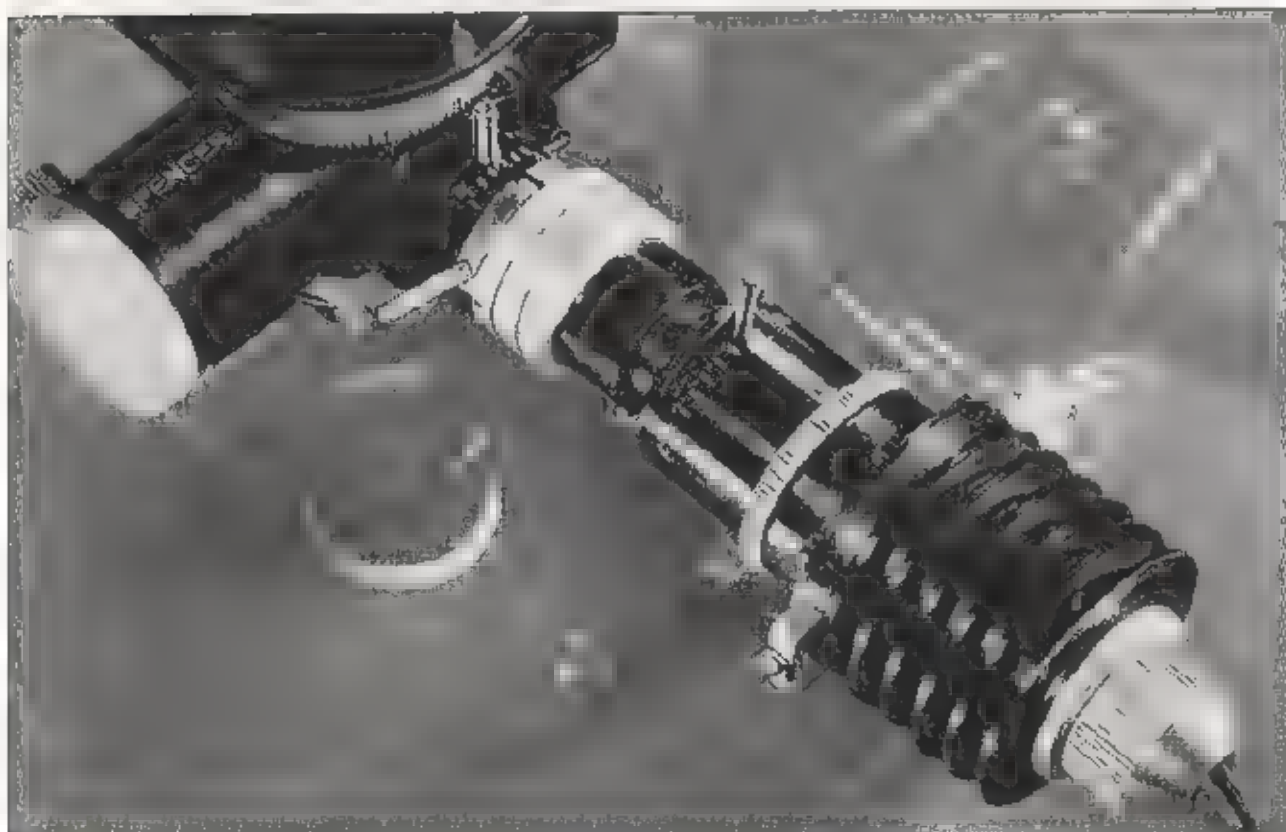
The material to be examined must be placed on a slide of a thickness between 1.15 and 1.25mm to be in focus. The slide must be very clean. It is necessary that there be immersion oil between the top of the condenser and the slide. The Spencer bispheric dark field condensers are very accurately constructed, and for best results it is necessary that the condenser be carefully centered and focused. Detailed instructions are furnished with the condenser or may be obtained on request. It is important that an intense source of light be used with the dark field condenser without a built-in lamp. The lamp should be focused to provide parallel light to the microscope condenser, Fig. 39. With lenses of numerical aperture greater than 0.85 it is necessary to reduce the N. A. to this value by inserting a funnel stop into the ob-

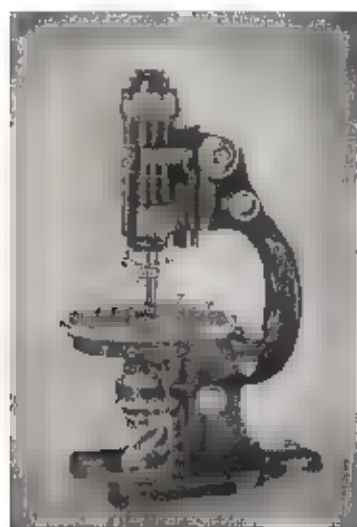
jective, or closing the iris diaphragm in the objective when so equipped. For dark field observation an objective with a built-in iris diaphragm is useful and provides convenient adjustment of the aperture.

The **vertical illuminator**, Fig 42, is attached to the microscope after removing the nosepiece. The objective is screwed to the under side of the vertical illuminator. The simpler types of vertical illuminator use an auxiliary lamp, while the more complete ones have built-in illumination. Light from the lamp is reflected down through the objective onto the specimen and from the specimen back through the objective to the eyepiece and to the observer's eye. Vertical illumination is essential for opaque specimens and is used principally in metallography.

**Polarizing attachments** may be used on most microscopes. A polarizer is placed in the fork substage mount in place of the regular condenser, or a Polaroid disc is placed in the condenser slot or on the lamp to polarize the light so that it vibrates in only one plane. The analyzer fits within or above the eyepiece and may be rotated until the field is dark, when the axes of the polarizer and analyzer are crossed. Anisotropic substances placed between the crossed polarizer and

*Fig. 42. Vertical illuminator.*

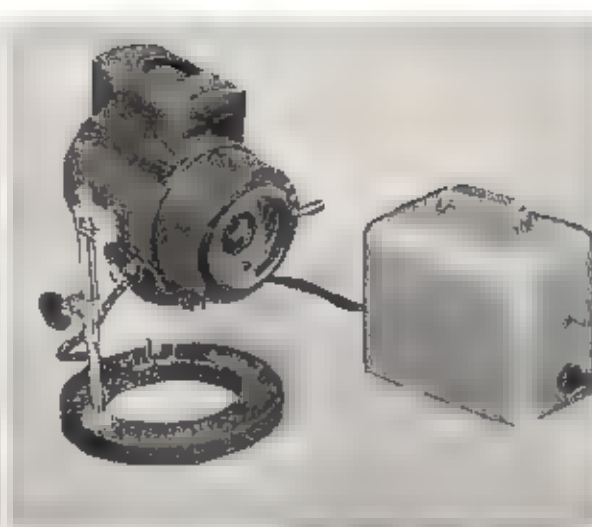




*Fig. 43.*  
*Research polarizing microscope*  
*(Calcite system).*



*Fig. 44.*  
*Polarizing microscope*  
*(Polaroid system).*



*Fig. 45.* *Mercury vapor*  
*illuminator furnishes*  
*ultraviolet radiation.*

analyzer show colors, and from the colors it is possible to learn a great deal about the nature of the specimen. Crystals may be identified and their optical properties measured. The images obtained with polarized light are valuable for the study of a great many materials, including chemicals, crystals, minerals, colloidal suspensions, biological fine structure, foods and drugs, and textiles. Polarizing microscopes, Figs. 43, 44, are preferable to attachments when this method is the chief use for the microscope.

**Fluorescent materials** emit visible light when irradiated with invisible ultraviolet radiation. Some do this naturally, while other materials must be treated with fluorescent solutions: a procedure analogous with staining. A source of ultraviolet radiation is directed into the microscope as in Fig. 39. A filter is placed on the source to transmit no visible light and the fluorescence of the specimen may be seen or photographed in its natural color. When the absorption of the specimen is in the long ultraviolet or blue light, a filter transmitting these radiations is used and a yellow filter is placed on, or in the microscope ocular. Looking through the yellow filter the field appears dark as it is in complementary color to the radiation and any yellow or red fluorescence may be seen. A brightfield microscope, preferably with coated optics, can be used in a dimly lighted room.

Transparent specimens with detail formed by differences of refractive index or slight absorption should be examined with phase microscopy. Phase equipment consists of a spe-



cial condenser, an objective with a diffraction plate appropriate to the specimen, and an aligning telescope. It may be used on the brightfield microscope.

After the phase microscope is focused on the specimen, the ocular is removed and the telescope placed in the eyepiece tube. The condenser is centered to the objective and the proper annulus turned into place in the condenser turret. The annulus is centered so that its image coincides with the diffraction plate in the objective. Replacing the telescope with the ocular makes the Phase Microscope ready for use. The Köhler method of illumination is usually used, Fig. 40, although the other initial method is satisfactory when the source is uniform. Contrast may be controlled by the use of different diffraction plates and images of parts of the specimen with higher refractive index may be made to appear either brighter or darker than those of lower optical path. The phase microscope is used for the examination of living tissues, cells and microorganisms, glass, plastics, emulsions and transparent materials where staining procedures would be unsatisfactory.

The **AO-Baker Interference Microscope** may be used for the examination of similar materials to those for the phase microscope and provides variable contrast in color, and with monochromatic light makes possible measurement of optical path difference, refractive index, and for reasonably homogeneous materials, the estimation of the hydrous and anhydrous mass.

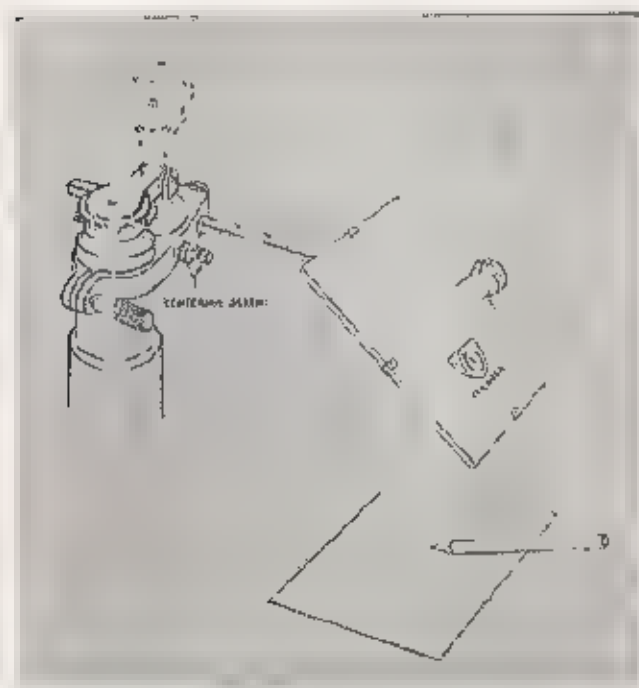
After focusing the specimen, the back aperture of the objective is examined with a telescope and a fringe is spread uniformly over the aperture by tilting the special condenser. Two types of objectives are available: shearing and double focus. The shearing is preferred for measurement and the double focus is useful in examining large specimens such as tissue sections. For measurement a mercury arc is used, Fig. 45, with a filter to isolate either the blue, green or yellow line to give monochromatic radiation. The source is focused by the Köhler method, Fig. 40. Details on the use of the fluorescent interference or phase microscope may be obtained from the references cited in Chapter 10.

## 8. Recording Observations

A permanent record of an observation made with the microscope is often desired and sometimes necessary. Some observations may be described in essay form, but in general a drawing of the object seen is the most useful record. A drawing may be facilitated by placing a reticule ruled in squares, Fig. 29a, into the eyepiece. The ruling is seen in focus with the specimen and if corresponding squares of appropriate size are drawn on the paper it is quite easy to draw the outline of the object seen from square to square.

If the microscope is tilted so that the stage is vertical and a strong lamp used, it is possible to project the image onto a paper held by a suitable easel and the image traced directly. A more convenient arrangement is to place a prism over the eyepiece of the microscope so that the image is reflected on the drawing paper. When much drawing of this type is done, special microprojectors are useful.

The **camera lucida** is used for making accurate drawings and consists of a partly silvered prism placed over the eyepiece of the microscope and a mirror for viewing the drawing surface. Some of the light passes from the microscope through the partially silvered surface to the eye, and light from the drawing surface is reflected by the mirror to the prism and to the eye. The result is that the image of the pencil and drawing is seen superimposed on the image of the



*Fig. 46.*

*The camera lucida showing light paths.*

object, Fig. 46. Underneath the prism is a rotating disc with neutral density filters. The disc is turned until the specimen is seen with proper intensity. A similar series of neutral filters is held on a collar surrounding the prism. By turning this collar until the proper one is in place between the mirror and the prism, the amount of light coming from the paper may be balanced against the light coming from the microscope. If the pencil is seen more clearly than the image, turn a denser glass into place between the mirror and prism, or use a lighter glass between the prism and the microscope to balance the light. In a bright room a screen should be used to shade the drawing from excess light.

The camera lucida may be used on monocular or binocular microscopes and on the low power stereoscopic microscope. With the monocular microscope the mirror is set  $45^\circ$  to the paper. With the binocular microscope with convergent eyepieces a little more than  $45^\circ$  is used to avoid distortion of the drawing. A special camera lucida is used with the inclined binocular body and it will be found that the image on the table is rotated  $60^\circ$ . To adjust the camera lucida for the stereoscopic microscope, the axis of the mirror is made parallel to the drawing surface and the mirror is tilted until there is no distortion.

To make certain that there is no distortion it is desirable to trace an object of known shape, such as a stage micrometer or the ruling of a hemacytometer. A little practice teaches how to tilt the mirror so that distortion is minimal and to balance the light so that the image and the pencil can both be seen. After making the outline drawings the prism is lifted out of view and the details are filled in from direct observation.

**Reconstructions** are made by drawing the image of successive sections on pieces of wax which are cut out and combined into a solid model, or the images may be drawn on separate pieces of glass or cellophane and superimposed on each other, or properly spaced in a frame. (*Cf. Bibliography*).

**Photomicrography.** The quickest and often the most satisfactory record is a photograph, especially if taken in natur-



al color. Uncolored specimens and record photomicrographs may be made in black and white on a large variety of materials. Filters may be used to obtain the balance desired in the photograph. The photographic technic is the same as in other fields.

Photomicrographic cameras have no lenses and use only the highly corrected lenses of the microscope. The fixed bellows camera, Fig. 47, requires little adjustment and the convenient side telescope provides rapid focusing and exposure. The fixed bellows camera is limited in magnification to the combinations of objectives and eyepieces available. The larger cameras have adjustable bellows, and the magnification may be adjusted by increasing or decreasing the bellows length to any value within the scope of the instrument.

The trinocular, Fig. 48, includes a 35mm camera, is interchangeable with the monocular and binocular bodies of the Microstar line, and is convenient for photomicrography in color or black and white.

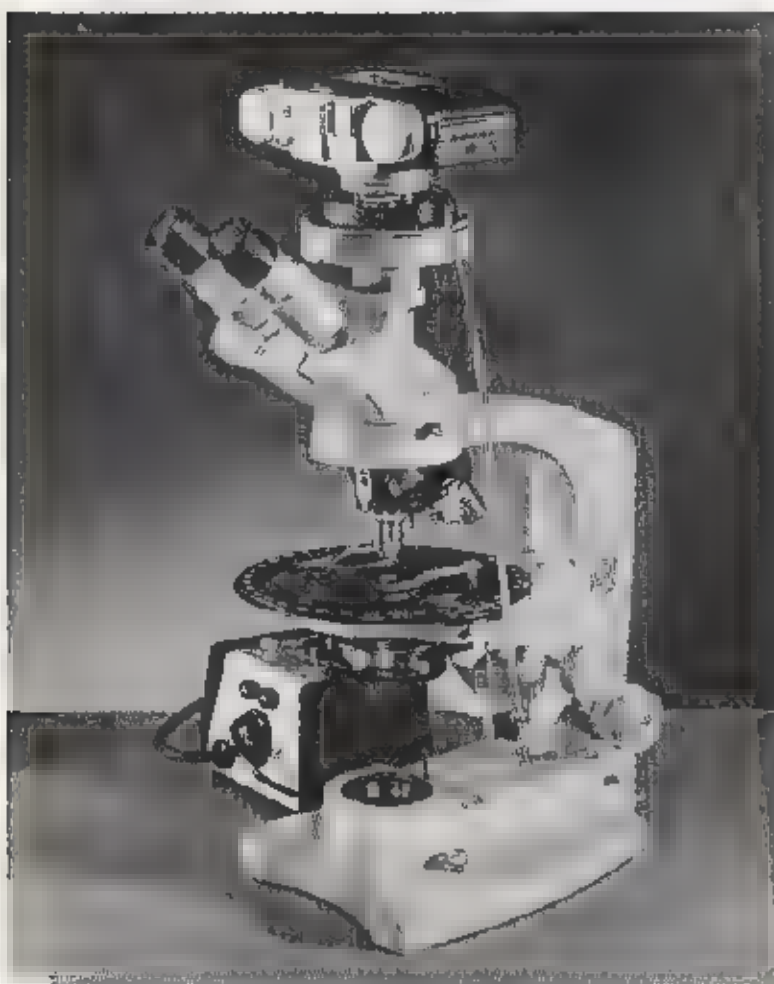
The microscope is placed on the base of the camera, centered and focused to the ground glass or the focusing telescope. Photographic eyepieces should be used to correct the residual curvature of field of the objective and to avoid distortion. Köhler illumination is preferable. The diaphragm of the lamp (field stop) must be closed to the area of the field photographed. Otherwise glare will prevent a photograph with good definition. Apochromatic objectives, compensating eyepieces, and a corrected condenser are necessary for the best rendering of colored objects, especially if color separation negatives are made directly from the microscope.

The condenser of the microscope must be properly focused when natural color photomicrographs are taken; otherwise the background may be tinted from the chromatic aberrations of the condenser and the colors of the specimen may be affected.

The exposure may be determined by making a trial negative with a series of different exposures or an approximate exposure may be obtained from an exposure meter. Move the slide to one side so that only clear glass shows in the



*Fig. 47*  
*Microstar laboratory*  
*microscope with*  
*trinocular body*  
*and*  
*photomicrographic*  
*camera.*



*Fig. 48.*  
*Microstar laboratory*  
*microscope equipped*  
*with trinocular body*  
*and attached 35mm*  
*camera*

field. Place a photoelectric exposure meter at the level of the plate (after removing the ground glass). The exposure is read from the meter set to the emulsion speed used, at the  $f/2$  position on the meter. This is an arbitrary value that gives good results for the average microscope slide. Very dense or very transparent specimens may take somewhat longer or shorter exposures.

Longer exposures than can be estimated by the above simple method may be required for fluorescence, interference, and phase microscopy. There are many sensitive photoelectric exposure meters on the market and these should be used as directed by the manufacturer.

With a light source of proper color temperature, it is possible to obtain photomicrographs that have the same color rendering as the specimen is seen through the microscope. Natural color films are Anscochrome, Ektachrome and Kodachrome. All are satisfactory and the choice depends on one's personal preferences with regard to the slight differences in color balance of the films. When making photomicrographs of fluorescence or interference microscope preparations, the daylight type of color films should be used.

The magnification must be sufficient to make the detail resolved by the microscope large enough to be within the resolving power of the plate or film and to be seen. Enlargement of the negative, or projection of the positive must be considered, when that type of examination is to be used. Fast panchromatic emulsions resolve 40 to 60 lines per millimeter, positive emulsions around 100, and slow contrast emulsions about 175 lines per millimeter. A strict standard of definition for contact prints to be examined without further enlargement is 300 times the N.A. of the objective used. If a lower standard of definition is acceptable, the magnification may be increased to 1000 N. A. (*Cf. Photomicrography*, 1944). With ultraviolet radiation and with phase microscopy, greater magnification may be useful.



## 9. Conclusion

The detail given in this manual is barely enough to acquaint the user with the nature and possibilities of the microscope, some of its limitations, and brief instructions for the use and care of the instrument. The methods used in microscopy have become so varied that it is impossible to indicate more than simple methods and suggest possible application. The importance of the microscope need not be emphasized here as it is clearly evident how the microscope has contributed to the happiness of mankind, to his information, and to the higher standards of living from improved materials and products. It is an indispensable aid to the doctor for the prevention and cure of disease. Subjects are offered to the artist and ideas for the designer.

Much time and considerable effort may be saved by study of the books and references given in the bibliography, for they offer the experience of other microscopists. Necessary skill comes with practice. Do not be disappointed if at first less is seen than anticipated. The more the microscope is used the more one learns to see, and improvement may be expected as long as the microscope is used. It is not a tool for the moment but rather one for life. Should one become tired easily with moderate periods of use, re-read the instructions and improve the methods used. Periods of several hours' work are possible with good light and a modern microscope, provided the eyes are rested occasionally.

While the microscope has the greatest practical utility in many fields, it also offers unlimited possibilities as a hobby for exploration in the world of the minute, where beauty and artistic forms predominate.

## 10. A Selected Bibliography

The selections given are intended to suggest current methods and to lead to detailed sources of information. Popular, non-technical, and older less available books are omitted.

These books are not sold by us, but may be obtained from your local bookstore, or the publishers. Some of the older ones are available in many public libraries.

An asterisk designates an out-of-print book which is useful or not replaced by a revision. Such books may be found in many libraries and sometimes on the secondhand market.

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